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Publishers Weekly

The Journal of the Book Industry

BOOKMOBILES: BRINGING BOOKS TO RURAL READERS
THE GALLUP SURVEY: WHO READS MYSTERIES?
RELIGIOUS PUBLISHING

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The Gallup Survey

American Readers Love a Mystery

A majority of Americans read mysteries, according to a recent Gallup Survey. More than six in 10 (62%) adults interviewed by the Gallup Organization reported they had read a mystery book, with the college educated (74%), employed women (69%), those under 50 (67%) and people living on the East or West coasts (65% and 67% respectively) the most likely to have done so *(Table 1)*.

Among those who read mysteries, adventure and detective stories are the favorites, each read by more than 60% (the classifications are those of readers themselves). Crime novels are read by about half, and books about spies and political intrigue are next in line. Nearly a third have read a police mystery, and nearly a quarter have read a solve-it-yourself-style mystery *(Table 2)*.

Paperbacks are the dominant format for mystery books, with half of their readers saying that most of their last 10 purchases were in paperback. On average, 6.7 of the last 10 purchased were in that format *(Table 3)*.

Mystery readers prefer their books to be written in either a hard-boiled (29%) or romantic style (32%), but preferences, as might be expected, differ strongly by sex *(Table 4)*.

Mystery readers are also interested in sidelines; nearly half of them have purchased some other mystery-related product, with one in five having bought a mystery magazine (22%) or board game (21%), and one in 10 having bought a videotape (9%). Men are more likely than women to be interested in these related products, particularly magazines *(Table 5, on page 18)*.

—*Leonard A. Wood*

TABLE 1

MYSTERY READER DEMOGRAPHICS

Based on Total Respondents

	Ever Read a Mystery Book %	Number of Interviews
Total	62	(1554)
Sex		
Male	60	(779)
Female	64	(775)
Age		
18–24 years	70	(186)
25–34 years	68	(345)
35–49 years	65	(434)
50 and older	54	(583)
Education		
College	74	(574)
High school graduate	64	(627)
Less than high school graduate	43	(338)
Women's Employment Status		
Full time	68	(250)
Part time	72	(119)
Not employed	59	(389)
Region		
East	65	(390)
Midwest	60	(412)
South	59	(465)
West	67	(287)

TABLE 2

PREFERRED MYSTERY CATEGORIES

Based on Those Who Have Ever Read a Mystery

Type of Mystery	Type Have Ever Read %	Favorite Type %	Would Like More of %
Adventure	65	31	32
Detective	62	19	14
Crime	47	9	4
Spy/Political Intrigue	42	14	15
Police	32	3	4
Solve-It-Yourself	23	7	11
Other	2	2	2
Don't Know	2	15	15
Number of Interviews	(971)	(971)	(971)

TABLE 3

MYSTERIES IN PAPERBACK

Of Last 10 Mysteries Purchased Number of Paperbacks	Total Have Read a Mystery Book %
1	3
2–3	6
4–5	8
6–8	7
9–10	50
None	16
Don't know	10
Total	100
Mean Number of Paperbacks	6.7
Number of Interviews	(971)

TABLE 2

PREFERRED STYLE

	Hard-Boiled %	Romantic %	Number of Interviews
Total Have Read a Mystery	29	32	(971)
Sex			
Male	47	13	(463)
Female	14	49	(508)
Age			
18–24 years	33	37	(128)
25–34 years	34	28	(228)
35–49 years	27	33	(293)
50 years and older	25	32	(319)

■ Gallup Survey

TABLE 2

THE MARKET FOR RELATED PRODUCTS

	Magazine %	Board Game %	Video Tape %	Weekend %	Software %	Other %	None %	Don't Know %	No. of Interviews
Total Have Read a Mystery	22	21	9	3	3	–	50	2	(971)
Sex									
Male	26	22	11	3	5	–	44	2	(463)
Female	19	20	7	3	1	–	55	2	(508)
Age									
18–24 years	22	30	17	5	9	–	32	1	(128)
25–34 years	20	28	10	4	*	1	46	1	(228)
35–49 years	20	21	10	1	4	–	52	3	(293)
50 years and older	26	10	2	3	1	–	61	3	(319)
Education									
College	18	26	7	2	3	–	51	2	(425)
High school graduate	26	22	10	5	2	–	47	1	(399)
Less that high school graduate	23	7	11	3	4	–	52	5	(140)
Women's Employment Status									
Full time	20	19	10	1	2	–	56	–	(170)
Part time	17	35	5	–	2	–	49	–	(89)
Not employed	20	14	6	6	1	–	56	4	(237)
Region									
East	19	18	10	1	3	–	58	1	(246)
Midwest	23	24	5	3	2	–	50	3	(255)
South	27	20	10	6	2	–	43	1	(279)
West	18	22	11	1	6	1	49	3	(191)
Number of Mysteries Read in Past 3 Months									
None	19	20	9	2	2	–	51	2	(599)
One	24	27	7	6	3	–	50	–	(127)
Two	32	21	11	8	6	–	45	–	(70)
Three or more	29	23	9	3	2	–	46	1	(106)

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CHILDREN'S BOOK SCENE
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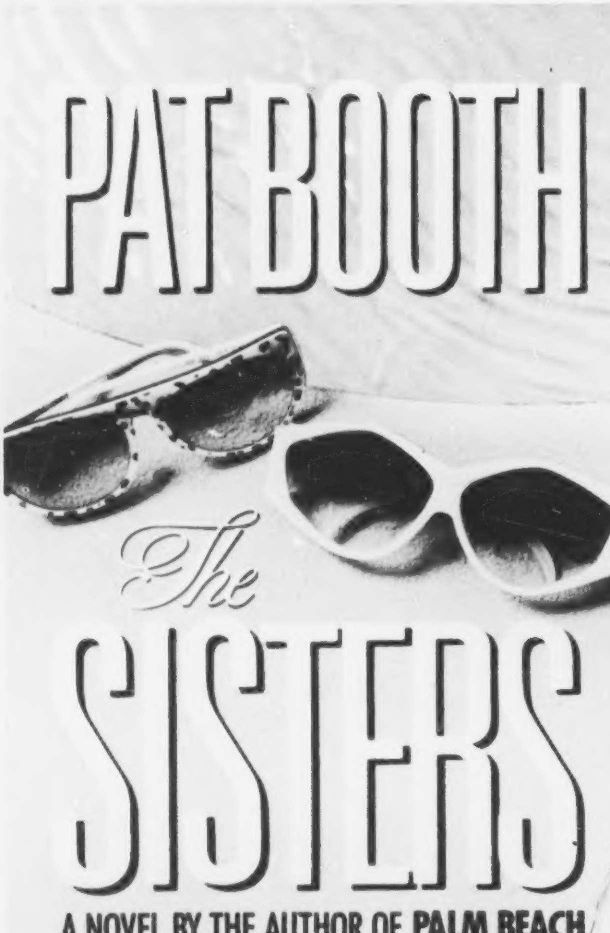

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Arbor House Reduces List, Eliminates Several Jobs

In an effort to compete more effectively in the marketplace, Arbor House announced it will reduce title output from 70 in 1987 to 40 by 1989. The list reduction also results in the elimination of several editorial positions.

Editor-in-chief Ann Harris, senior editor James Raimes, managing editor Susan Friedland and three assistants will no longer be with the company effective January 1. Arbor House president Eden Collinsworth and executive editor Allan Mayer, who joined the company last year from *Newsweek*, will oversee the editorial process.

Collinsworth told *PW*, "This is not a reaction to poor performance. Our sales have increased by 35% this year. It was a decision I made, and I wanted to make it from a position of strength rather than three years later when a decision may be imposed upon us."

She denied rumors that Arbor House will become an imprint of Morrow. "That is not the case. If Hearst wanted to make us an imprint of Morrow, they would have done it long ago. We remain independent of Morrow and will continue to acquire, publish, promote, sell rights and distribute ourselves."

Collinsworth said Arbor House competes not only with major hard/soft publishers but also with Morrow within the Hearst Book Group. "There are two ways to compete, by volume or by keeping the list small and publishing it well. I decided that the best thing for Arbor House is to step back, reduce its list and do things in a different way. We're known as an idiosyncratic house, and we want to keep it that way. We're offering agents the unique arrangement of having hands-on management participation in the publication of each new book. I'm trying to carve out a niche for Arbor House, and this is a first step."

The list reduction will be implemented gradually, Collinsworth said. In 1987, 70 titles are scheduled for publication; in 1988, 51 titles and by 1989 the list will be down to 40 titles.

Arbor House is able to compete for blockbusters on an equal footing with Morrow, Collinsworth said, because it receives the same financial backing from Hearst. It recently signed a $3 million, two-book contract with Elmore Leonard.

The move to scale down operations coincides with Arbor House's impending move to the building now occupied by Morrow. Avon Books—the paperback subsidiary of the Hearst Book Group—will also move into Morrow's building early next year.

—*M.Y.*

Group to Study Religious Publishing

The first major study of the Christian publishing and distribution industry in the U.S. and Canada is being conducted by a team of researchers from the Center for Book Research at the University of Scranton. The study is sponsored by the Christian Booksellers Association, the Evangelical Publishers Association and the Protestant Church-Owned Publishers Association. It will report on the development of publishing, marketing and distribution of Christian books in the U.S. and Canada since World War II, examine the current condition of the industry and project market trends for the next century.

1985 Leaders in Growth and Performance

In its study of 26 book publishing companies, ranging in size from under $10 million to $664 million, the New York investment banking firm of Veronis, Suhler & Associates found that the publishers' 20.5% revenue growth for 1985 more than doubled that of 1984. Here are the star performers.

Growth Leaders

	Rank	Revenues		Pretax Operating Income		Pro Forma Operating Cash Flow	
1985 $ Mil Totals	1	G+W	$663.6	Time	$85.0	SFN Cos.	$99.9
	2	Time	552.0	G+W	79.5	Time	88.0
	3	McGraw-Hill	460.2	SFN Cos.	74.9	G+W	85.1
	4	HBJ	390.3	McGraw-Hill	67.5	McGraw-Hill	75.3
	5	SFN Cos.	389.0	Macmillan	58.9	Macmillan	75.3
1985 Growth (%)	1	G+W	132.3	Scholastic	3750.0	Price/Stern/Sloan	1050.0
	2	Price/Stern/Sloan	60.0	Harlequin	165.9	Scholastic	260.0
	3	Macmillan	26.8	G+W	151.6	G+W	154.8
	4	MCA	18.5	Western	78.4	Harlequin	106.4
	5	Bell & Howell	14.3	John Wiley	54.8	Western	80.7
5-Year Compound Annual Growth Rate %	1	G+W	43.2	MCA	72.0	G+W	57.0
	2	Price/Stern/Sloan	27.8	G+W	57.0	Price/Stern/Sloan	26.4
	3	MCA	21.9	Western	53.1	Macmillan	25.0
	4	Bell & Howell	15.8	Price/Stern/Sloan	28.4	Scholastic	21.8
	5	Thomas Nelson	15.7	Macmillan	28.2	Plenum	17.7

Performance Leaders

	Rank	1985 Return On Assets (%)		1985 Margins (%)		81 V. 85 Margin Change (Points)	
Pretax Operating Income	1	Waverly Press	30.5	Plenum	29.1	Western	10.1
	2	Time	29.9	SFN Cos.	19.3	MCA	9.5
	3	Western	29.4	Macmillan	15.9	Time	8.5
	4	Plenum	25.5	Time	15.4	Plenum	7.8
	5	MCA	25.5	McGraw-Hill	14.7	Macmillan	6.5
Pro Forma Operating Cash Flow	1	Waverly Press	31.1	Plenum	32.3	Plenum	8.4
	2	Time	30.9	SFN Cos.	25.7	Time	8.3
	3	Irwin	30.7	Macmilan	20.4	Macmillan	7.0
	4	Western	30.0	Irwin	20.0	Wm. Sadlier	6.3
	5	Plenum	28.4	Grolier	16.5	Grolier	4.6

Third Quarter Book Sales: Spotty

By John P. Dessauer

Textbook sales improved, but most consumer categories slowed down during the third quarter. Exceptions were mass market paperbacks, which showed fair unit gains after three quarterly declines. Since about half of annual elhi and college textbook sales are consummated in this quarter, the pace of total industry sales decreased only marginally. However, unless consumer sales recover the strength they exhibited in the second quarter, 1986 could prove to be a disappointing year for most publishers and booksellers.

Readers comparing the current estimates with those of the first two quarters (*PW*, June 27 and Sept. 5, 1986), should note that the present data incorporate my final revision of 1985 sales for *Book Industry Trends* (BISG), which utilizes the annual statistical reports released during the summer by AAP and ECPA. This revision, comparable to similar revisions in years past, results in some discontinuity with, particularly, the unit figures of the previous estimates. ☐

TABLE 1

ESTIMATED PUBLISHERS' NET BOOK SALES—THIRD QUARTER 1986

(Millions of Dollars and Units)

	July–Sept. 1986		July–Sept. 1985		Percent Change		Jan.–Sept. 1986		Jan.–Sept. 1985		Percent Change	
	Dollars	Units	Dollars	Units	Dollars	Units	Dollars	Units	Dollars	Units	Dollars	Units
Trade	784.0	197.54	750.8	203.07	4.4	(2.7)	2,007.1	481.26	1790.8	466.14	12.1	3.2
Adult Hardbound	376.1	60.08	354.4	59.39	6.1	1.2	1,048.7	169.30	902.5	152.94	16.2	10.7
Adult Paperbound	239.3	62.30	235.6	68.92	1.6	(9.6)	557.3	148.72	545.8	164.21	2.1	(9.4)
Children's Hardbound	96.9	28.42	103.2	30.31	(6.1)	(6.3)	280.1	82.17	246.4	72.36	13.7	13.6
Children's Paperbound	71.6	46.75	57.6	44.46	24.4	5.2	121.0	81.07	96.1	76.63	25.9	5.8
Religious	171.0	35.28	163.1	37.00	4.8	(4.7)	488.5	102.95	460.3	107.6	6.1	(3.8)
Hardbound	120.3	15.27	114.6	16.33	4.9	(6.5)	344.2	44.92	323.5	47.55	6.4	(5.5)
Paperbound	50.7	20.01	48.5	20.67	4.6	(3.2)	144.4	58.03	136.9	59.51	5.5	(2.5)
Professional	794.6	55.08	749.4	52.49	6.0	4.9	1965.3	137.33	1773.6	124.67	10.8	10.2
Hardbound	531.41	18.97	504.3	18.64	5.4	1.7	1,308.2	47.05	1,193.6	44.46	9.6	5.8
Paperbound	263.2	36.11	245.1	33.84	7.4	6.7	657.1	90.28	580.0	80.21	13.3	12.5
Book Club	196.9	35.07	194.1	36.43	1.5	(3.7)	506.8	92.32	493.7	95.25	2.7	(3.1)
Hardbound	165.0	14.22	162.3	14.76	1.6	(3.7)	422.8	36.89	410.5	37.81	3.0	(2.4)
Paperbound	32.0	20.86	31.7	21.86	0.7	(3.8)	84.0	55.43	83.2	57.45	1.0	(3.5)
Mail Order Publications	152.3	31.37	146.5	29.33	4.0	7.0	446.2	91.20	434.0	86.25	2.8	5.7
Mass Market Paperbound	272.5	179.30	259.7	171.97	5.0	4.3	745.8	469.88	725.5	469.64	2.8	(0.1)
University Presses	36.7	3.84	33.7	3.77	8.9	1.9	81.4	8.66	75.7	8.69	7.6	(0.4)
Hardbound	25.4	1.42	23.6	1.43	7.7	(0.6)	56.6	3.21	52.8	3.24	7.2	(1.2)
Paperbound	11.2	2.43	10.1	2.35	11.8	3.4	24.8	5.45	22.9	5.44	8.4	0.1
Elhi Text	866.6	143.09	758.9	135.66	14.2	5.5	1,421.3	228.49	1,292.7	225.99	9.9	1.1
Hardbound	503.9	50.21	429.7	46.07	17.3	9.0	821.2	82.53	731.9	79.26	12.2	4.1
Paperbound	362.7	92.88	329.2	89.59	10.2	3.7	600.1	145.96	560.8	146.73	7.0	(0.5)
College Text	798.0	52.57	729.0	54.16	9.5	(2.9)	1,149.6	81.17	1,086.8	84.24	5.8	(3.6)
Hardbound	672.6	35.31	612.7	36.15	9.8	(2.3)	969.1	54.62	913.3	56.33	6.1	(3.0)
Paperbound	125.4	17.27	116.4	18.01	7.7	(4.1)	180.6	26.55	173.5	27.91	4.1	(4.9)
Subscription Ref.	56.9	0.15	57.9	0.16	(1.7)	(6.1)	154.8	0.40	156.7	0.42	(1.2)	(5.1)
Total	**4,129.5**	**733.31**	**3,843.0**	**724.05**	**7.5**	**1.3**	**8,966.8**	**1,693.66**	**8,289.7**	**1,668.37**	**8.2**	**1.5**

TABLE 2

ESTIMATED DOMESTIC CONSUMER EXPENDITURES ON BOOKS—THIRD QUARTER 1986

(Millions of Dollars and Units)

	July–Sept. 1986		July–Sept. 1985		Percent Change		Jan.–Sept. 1986		Jan.–Sept. 1985		Percent Change	
	Dollars	Units	Dollars	Units	Dollars	Units	Dollars	Units	Dollars	Units	Dollars	Units
General Retailers	1,744.5	265.80	1,617.2	265.71	7.9	0.0	4,320.7	669.02	3,942.3	659.16	9.6	1.5
College Stores	1,256.2	112.93	1,124.4	108.84	11.7	3.8	2,407.0	219.85	2,288.0	225.46	5.2	(2.5)
Libraries & Institutions	323.0	23.12	301.9	22.81	7.0	1.4	984.3	71.38	908.1	69.55	8.4	2.6
Schools	809.6	115.07	699.0	107.92	15.8	6.6	1,468.5	211.25	1,331.4	208.47	10.3	1.3
Direct to Consumer	481.2	61.76	483.8	64.57	(0.5)	(4.3)	1,422.1	184.29	1,364.7	183.95	4.2	0.2
Other	69.5	29.33	66.0	29.88	5.3	(1.8)	251.3	107.99	228.0	105.22	10.2	2.6
Total	**4,684.0**	**608.02**	**4,292.3**	**599.72**	**9.1**	**1.4**	**10,853.9**	**1,463.78**	**10,062.5**	**1,451.80**	**7.9**	**0.8**

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The Journal of the Book Industry

LOOKING BACK ON '86: TRENDS & HIGHLIGHTS OF A BUSY YEAR
B D & M: U.S. BINDERIES GO HIGH TECH

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Year End '86

PW Index Underperformed

THE PUBLISHERS WEEKLY INDEX(As of the End of November)

	CLOSING PRICES		CHANGE
	11/28/86	12/31/85	YTD
Addison-Wesley (Class B)	$ 36.50	$ 33.75	8.1%
Grolier	11.63	6.50	78.9
Gulf+Western	68.00	49.75	36.7
Harcourt Brace Jovanovich	31.75	24.83	27.9
Harper & Row	24.75	22.38	10.6
Houghton Mifflin	29.63	23.25	27.4
Macmillan	42.13	38.00	10.9
McGraw-Hill	59.75	48.00	24.5
John Wiley & Sons (Class B)	32.00	43.00	(25.6)
***Publishers Weekly* Index**	811.92	691.57	17.4
Dow Jones	1,914.23	1,546.67	23.8
S & P 400	277.73	234.56	18.4

Typically, investors would be pleased with an annual return on their money of 17%–18%. However, 1986 was an unusual year. Our year-end survey (which runs only through the end of November due to an early deadline) indicates that the *Publishers Weekly* Index, a composite of the stocks of nine major publishing companies, gained 17.4% year-to-date compared to 18.4% and 23.8% gains for the Standard & Poor's 400 and Dow Jones Industrial Average, respectively.

Most of the weakness in the *PW* Index surfaced in the second half of 1986, for during the first half the Index was outpacing the market. Without a sharp rebound in December, this will mark only the third year that the *PW* Index has underperformed the DJIA, and only the fourth time it has underperformed the S & P 400. Only one of the nine stocks—John Wiley & Sons—posted a price decline, but three other stocks underperformed the major market indices.

Poor operating results had an impact on Wiley's stock, which declined sharply. The company reported negative year-over-year earnings-per-share comparisons for its April and July fiscal quarters. This trend was reversed as the recently released October fiscal quarter results exhibit improved earnings per share.

Addison-Wesley, Harper & Row and Macmillan also underperformed. The major news at Addison-Wesley this year was the November announcement that the family of chairman Melbourne W. Cummings, which owns 83% of the company's Class A stock, would swap a substantial number of their shares for Class B stock currently held by other executives. The swap would spread voting control in the company among several members of top management. The Class A stock has voting control but is not publicly traded as is the Class B stock.

Harper & Row's price performance correlated closely with its operational performance as it reported negative comparisons in its January, April and July fiscal quarters. The company, however, posted improved earnings in its October fiscal quarter, and the stock has reacted positively to the news.

Macmillan was among the best performers in the Index prior to the release of a September 30 *Financial World* article that was quite negative. In the wake of that article, the stock dropped about 25% and has yet to recover. Macmillan has been an extremely active acquirer of small companies during 1986, but such purchases have not come close to approaching the company's $75 million acquisition of ITT's publishing and information services businesses in April 1985.

McGraw-Hill, Houghton Mifflin and Harcourt Brace Jovanovich had price increases of 24%–28%. Despite weak operating results, McGraw-Hill outperformed the indices. Throughout the year there was speculation that the company would be acquired at a premium although no tangible evidence of such a transaction has surfaced. The company made several relatively small acquisitions during 1986, perhaps the most important being that of the Economy Company. This acquisition indicated McGraw-Hill's interest in remaining in the elhi school publishing business.

Houghton Mifflin also outperformed as its internally developed Riverside Publishing subsidiary supported strong revenue gains with its new reading and math series.

Harcourt Brace Jovanovich gets this year's award for most active company. HBJ came to the public market for funding twice, once in March when it sold $200 million in subordinated convertible debentures and once in July when it sold 4.9 million common shares for $163 million. Although the company made several acquisitions during the year, the major one was that of CBS Educational Publishing for $500 million.

Gulf + Western added to its string of major book publishing acquisitions, which began in 1984 with Prentice-Hall and Esquire and continued in 1985 with Ginn. In 1986 the acquisition was Silver Burdett, at a price tag of $125 million.

Grolier repeats as the stock that appreciated the most. Our year-ago survey indicated Grolier had posted a 92% gain through November. This year the stock was up nearly 79% year-to-date. The reduction in interest rates has been a major positive influence for Grolier, which has a total debt-to-capital ratio of 70%, the highest of any stock in the index. The company also has exhibited outstanding bottom-line growth throughout the year. As with McGraw-Hill, Grolier has been the subject of much takeover speculation—but also, as with McGraw-Hill, nobody has shown up with an offer.

Looking forward, we expect some of the stocks that experienced a tough 1986—namely John Wiley & Sons and Harper & Row—to post better relative price performance in 1987 if they can maintain the improved performance trends of the most recent reported quarter. Also, stocks of companies deeply involved in the elhi business will be aided by a heavy adoption schedule.

—*Kevin Gruneich*

Gruneich is vice-president, publishing/information analyst, for the First Boston Corporation.

Bestsellers Year End '86

Longest-Running Hardcover Bestsellers for 1986

The books on these *PW* hardcover and paperback bestseller lists are those that lasted longest on our regular weekly bestseller lists in 1986. This list of fiction and nonfiction titles does not necessarily reflect the year's bestselling hardcover books in terms of actual sales. Often titles that achieve bestsellerdom in the last few months of the year will have the highest rate of sales, because of Christmas purchases. The 1985 list of longest-running hardcover bestsellers included 19 fiction titles and 16 nonfiction titles that made the weekly charts 15 times or more.

Fiction

		# Wks. on '86 List	# Wks. on '85 List
1	* **The Mammoth Hunters.** Jean M. Auel. Crown (11/85; $19.95).	42	4
2	* **The Bourne Supremacy.** Robert Ludlum. Random House (3/86; $19.95).	32	–
3	* **Lake Wobegon Days.** Garrison Keillor. Viking (9/85; $17.95).	31	16
4	* **Last of the Breed.** Louis L'Amour. Bantam (7/86; $17.95).	27	–
5	* **Wanderlust.** Danielle Steel. Delacorte (7/86; $18.95).	24	–
6	* **Lie Down with Lions.** Ken Follett. Morrow (1/86; $18.95).	23	–
	* **I'll Take Manhattan.** Judith Krantz. Crown (5/86; $18.95).	23	–
7	* **Red Storm Rising.** Tom Clancy. Putnam (8/86; $19.95).	21	–
8	**Texas.** James A. Michener. Random House (10/85; $21.95).	20	10
9	**Through a Glass Darkly.** Karleen Koen Random House (9/86; $19.95).	18	–
10	**A Matter of Honor.** Jeffrey Archer. Linden Press/S & S (7/86; $18.95).	17	–
	* **A Perfect Spy.** John le Carré. Knopf (5/86; $18.95).	17	–
	The Garden of Eden. Ernest Hemingway. Scribners (6/86; $18.95).	17	–
11	**The Good Mother.** Sue Miller. Harper & Row (5/86; 17.95).	16	–
12	* **It.** Stephen King. Viking (9/86; $22.95).	16	–
13	**The Handmaid's Tale.** Margaret Atwood. Houghton Mifflin (2/86; $16.95).	15	–
	The Eighth Commandment. Lawrence Sanders. Putnam (6/86; $18.95).	15	–
	Act of Will. Barbara Taylor Bradford. Doubleday (6/86; $17.95).	15	–

Nonfiction

		# Wks. on '86 List	# Wks. on '85 List
1	* **Fit for Life.** Harvey and Marilyn Diamond. Warner Books (6/85; $16.50).	48	24
2	**Callanetics: 10 Years Younger in 10 Hours.** Callan Pinckney. Morrow (9/84; $16.95).	35	5
3	**You're Only Old Once.** Dr. Seuss. Random House (3/86; $9.95).	33	–
	* **Fatherhood.** Bill Cosby. Doubleday. (5/86; $14.95).	33	–
4	* **The Rotation Diet.** Martin Katahn. Norton (5/86; $15.95).	30	–
5	**The Be-Happy Attitudes.** Robert Schuller. Word (9/85; $12.95).	27	6
6	**Necessary Losses.** Judith Viorst. Simon & Schuster (4/86; $17.95).	25	–
7	**Women Who Love Too Much.** Robin Norwood. Tarcher/St. Martin's (6/85; $16.95).	21	16
	James Herriot's Dog Stories. James Herriot. St. Martin's (6/86; $19.95).	21	–
8	**Iacocca: An Autobiography.** Lee Iacocca with William Novak. Bantam (11/84; $17.95).	19	51
	* **Yeager: An Autobiography.** Gen. Chuck Yeager and Leo Janos. Bantam (7/85; $17.95).	19	23
	Bus 9 to Paradise. Leo Buscaglia Morrow/Slack (2/86; $16.95).	19	–
	The Rice Diet Report. Judy Moscovitz Putnam (4/86; $19.95).	19	–
	"And So It Goes": Adventures in Television Land. Linda Ellerbee. Putnam (5/86; $18.95).	19	–
9	**When All You've Ever Wanted Isn't Enough.** Harold S. Kushner. Summit Books/ Simon & Schuster (4/85; $16.95).	18	–
10	**Men Who Hate Women and the Women Who Love Them.** Dr. Susan Forward and Joan Torres. Bantam (9/86; $16.95).	16	–

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* These titles achieved the #1 spot during their 1986 tenure on *PW*'s Bestseller List.

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Longest-Running Paperback Bestsellers for 1986

This year not one of the 22 mass market bestsellers that made *PW*'s weekly bestseller charts for 10 or more weeks was an original paperback. In the trade paperback list, humor was again the dominant category, followed by tax books and annuals. Those three categories accounted for 11 of the 18 trade titles that were on our weekly lists for 10 or more weeks last year.

In 1985, there were 25 mass market titles and 22 trade paperbacks that made the weekly charts 10 or more times.

Mass Market

		# Wks. on '86 List	# Wks. on '85 List
1	* **Women Who Love Too Much.** Robin Norwood. (6/86; $4.50).	28	–
2	**The Hunt for Red October.** Tom Clancy Berkley (10/85; $4.50).	26	11
3	* **The Color Purple.** Alice Walker. Pocket Books (12/85; $4.50).	24	1
4	* **If Tomorrow Comes.** Sidney Sheldon. Warner (1/86; $4.95).	18	–
5	* **Lake Wobegon Days.** Garrison Keillor. Penguin Select (8/86; $3.95).	14	–
6	**Clan of the Cave Bear.** Jean Auel. Bantam (12/85† $4.95).	13	1
	* **Family Album.** Danielle Steel. Dell (3/86; $4.50)	13	–
	The Two Mrs. Grenvilles. Dominick Dunne. Bantam (6/86; $4.50).	13	–
	Lonesome Dove. Larry McMurtry. Pocket Books (8/86; $4.95).	13	–
	The Accidental Tourist. Anne Tyler. Berkley (9/86; $4.50).	13	–
7	**The Class.** Erich Segal. Bantam (2/86; $4.50)	12	–
	Queenie. Michael Korda. Warner (4/86; $4.90)	12	–
	* **A Creed for the Third Millennium.** Colleen McCullough Avon (4/86; $4.95)	12	–
	* **Hold the Dream.** Barbara Taylor Bradford. Bantam (4/86; $4.50)	12	–
	The Fourth Deadly Sin. Lawrence Sanders. Berkley (7/86; $4.50)	12	–
8	**Stillwatch.** Mary Higgins Clark. Dell (4/86; $4.50)	11	–
	* **Skeleton Crew.** Stephen King. NAL/Signet (4/86; $4.50)	11	–
9	**The Lonely Silver Rain.** John D. MacDonald. Fawcett/Gold Medal, (3/86; $4.50).	10	–
	* **Lucky.** Jackie Collins. Pocket Books (7/86; $4.95).	10	–
	The Cider House Rules. John Irving. Bantam (7/86; $3.95).	10	–
	* **Iacocca: An Autobiography.** Lee Iacocca with William Novak, Bantam (7/86; $4.50).	10	–
	The Red Fox. Anthony Hyde. Ballantine (9/86; $4.50).	10	–

Trade

		# Wks. on '86 List	# Wks. on '85 List
1	* **The Road Less Traveled.** M. Scott Peck. Touchstone/S & S (10/83; $9.95).	52	48
2	**Rand McNally Road Atlas 1986.** Rand McNally (11/85; $5.95).	40	4
3	* **Out of Africa and Shadows on the Grass** Isak Dinesen. Vintage (12/85; $4.95).	31	–
4	**What Color is Your Parachute 1986.** Richard N. Bolles. Ten Speed Press (4/86; $8.95).	28	–
5	* **Loving Each Other.** Leo Buscaglia. Fawcett/Columbine (4/86; $7.95).	26	–
6	* **Valley of the Far Side.** Gary Larson. Andrews, McMeel & Parker (9/85; $4.95).	22	15
7	**The Far Side Gallery.** Gary Larson. Andrews, McMeel & Parker (11/84; $8.95)	20	10
8	**Dianetics, Revised Edition.** L. Ron Hubbard. Bridge Publications (9/85; $4.95)	18	–
	* **It Came From the Far Side.** Gary Larson. Andrews, McMeel & Parker (8/86; $5.95)	18	–
9	**The World Almanac and Book of Facts 1986.** World Almanac Publications (11/85; $5.95).	17	–
	* **Bloom County Babylon.** Berke Breathed. Little, Brown (9/86; $12.95).	17	–
10	**Garfield Out to Lunch.** Jim Davis. Ballantine (3/86; $5.95).	16	–
11	**J. K. Lasser's Your Income Tax 1986.** J. K. Lasser Institute. S. & S. General Reference Group (12/85; $7.95).	15	–
	The Arthur Young Tax Guide 1986. Arthur Young & Co. Ballantine (12/85; $8.95).	15	–
	What They Don't Teach You at Harvard Business School. Mark H. McCormack Bantam. (7/86; $8.95).	15	–
12	**Adult Children of Alcoholics.** Janet Geringer Woititz. Health Communications (1983; $6.95).	14	–
13	**Less Than Zero.** Bret Easton Ellis. Penguin (6/86; $5.95).	12	–
	Growing Up Catholic. June Meara, Jeff Stone, Maureen Kelly and Richard Davis Doubleday/Dolphin (2/85; $4.95).	12	27

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* These titles achieved the #1 spot during their 1986 tenure on *PW*'s Bestseller List.

† current edition only

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THE WIDENING WORLD OF TRAVEL BOOKS
DISCOVERING THE WAREHOUSE CLUB MARKET
RELIGIOUS BOOKS

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Bookselling & Merchandising

Edited by ALLENE SYMONS and SONJA BOLLE

Warehouse Clubs: An Expanding Market

By Jean Crichton

It's not easy to find BJ's Wholesale Club in East Rutherford, N.J.—at the end of a drab back street in an industrial area near Giants Stadium. The place looks like an airplane hangar, inside and out. But that's no obstacle for hard-core shoppers—those lucky enough to be members, that is.

Flashing their identification cards, they rush into the cavernous sales space with bare cement floors, glaring lights and towers of industrial steel shelving. There is little effort at display: merchandise ranging from food and clothing to appliances, tires and office supplies are sold directly from opened cartons or piled on wooden pallets. Selection, styles and sizes are limited.

BJ's service is strictly no-frills, too. There are no home deliveries and no sales staff. Credit cards are not accepted—only cash and checks—and about the only amenities besides the jumbo-sized shopping carts are a few flatbed dollies to allow shoppers to get large appliances like refrigerators and washing machines to the cash register and then out to the parking lot.

The attraction is the prices, which run about 20%–40% lower than at supermarkets or discount stores. And among the bargains these days are books. *Men Who Hate Women and the Women Who Love Them* (Bantam), list-priced at $16.95, sells for $10.17; Abbeville's *John Singer Sargent*, marked at $85 and remaindered at $39.95, sells for $28.22; Workman's Teddy Bear Calendar ($12.95 list) for $4.91.

On a busy evening just before Christmas, BJ's book department—located farther back than the paper shredders and the Oriental carpets, but in front of the tires and the 12-packs of frozen lamb chops—attracts a swarm of shoppers. The store's selection of 100-plus titles is arranged in face-up piles on a table about 50 feet long with a raised platform in the center. As customers browse, stock clerks drive up periodically in forklifts and unpack shipping cartons.

BJ's book section features *New York Times* hardcover bestsellers at 40% off and paperbacks at 35% off. The weekly lists—clipped out of the paper and mounted in a desk photo frame—stand among the piles of books, though not all the listed titles are necessarily in stock at any one time. Besides bestsellers, there are cookbooks, art books, dictionaries, calendars and children's books, with coloring books and other inexpensive items shrinkwrapped in sets.

"We sell a lot of books, especially in the stores in metropolitan areas," says Mervyn Weich, president of BJ's, a 15-warehouse subsidiary of the Zayre discount store chain, based in Natick, Mass.

In fact, books move well in all the nation's members-only warehouses, according to Charles Tillinghast, president of Advanced Marketing Services, the San Diego distributor that supplies books to many of the major players in this specialized retailing field. Estimating the warehouse club industry's annual book sales at $100 million "would not be an exaggeration," he maintains. (In contrast, Waldenbooks reported sales of over $400 million last year.) "If a title works in the warehouse environment, the numbers get very large—sales might be 75,000 copies of a bestseller."

The decade-old membership warehouse industry presents a promising new opportunity for publishers—and yet another challenge for the traditional bookseller. In this article, *PW* takes a look at the way membership warehouses work, how they sell books, the wholesalers who service them, the publishers who sell to them and the book retailers who compete with them—yet may also be card-carrying members.

The Warehouse Club Concept The largest and best-known company in the membership warehouse business is Price Club, headed by Robert Price and his father, Sol, who originated the mem-

OOKS
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Crichton is a New York–based writer whose Age Care Sourcebook *is due from Simon & Schuster in August.*

Throngs of bargain hunters wheeling oversized carts at BJ's warehouse club outlet in East Rutherford, N.J., find *New York Times* bestsellers stacked between paper shredders and frozen peas

bership warehouse concept in San Diego in 1976. Expanding first in the West—California, Arizona and New Mexico—and more recently to Maryland and Virginia, Price Club now has more than 25 outlets, the most successful of which are said to do an annual sales volume of $150 million each.

After the first successful pioneering efforts, a number of other companies jumped in. Today there are 20-odd companies in the membership warehouse business, including subsidiaries of several established retailers (see box, page 58). Together they have some 200 outlets nationwide and grossed an estimated $8 billion in sales last year, up four times over an estimate 18 months earlier, according to *Discount Store News*, a retail trade magazine. What's more, the clubs are proliferating, with 800–900 operations expected by the mid-1990s.

Each of the clubs has its own merchandising profile, but all of them cultivate an atmosphere that is part retail, part wholesale. The perception of getting a bargain is heightened by the membership restrictions. About half the members are small businesses—mom-and-pop restaurants, offices and stores too small to buy profitably in wholesaler quantities. Business members pay $25–$40 a year to belong, depending on the club, and usually have shopping hours reserved for them.

But consumers can be members, too, if they work for (or are retired from) a branch of the government, a school, bank, hospital, airline or some other designated employer. Members of some trade and credit unions are also eligible, and any member may take guests. Some clubs charge individuals a yearly fee, while other add 5% to all purchases.

The warehouses deal in high-quality, brand-name merchandise, and successful outlets turn over inventory quickly—sometimes in less than a week. As a result, the clubs get the benefit of a "float," since suppliers offer payment terms of up to 60 days. That, combined with membership fees and the low overhead, means the clubs can make money operating on margins as low as 10%.

Books as Club Commodities The warehouse clubs regard books much the same way they do other merchandise: Selection is limited to a few brand-name items on which the value offered is easily perceived, and stock must turn quickly—whether it's books or frozen vegetables. "In a warehouse club," says Tillinghast of AMS, "there'll be one size of frozen peas, and that's it. If it's too large for you, tough luck."

For books, this means titles with an immediate recognition factor: bestsellers, cookbooks, children's books, classics, art and photo books on popular subjects. An average warehouse club location stocks only about 100–200 titles. Hardcover bestsellers typically sell at 40% off, but discounts can run higher. Last fall, for example, one California Price Club sold Stephen King's *It* at $12.69, 45% off the $22.95 list price.

Another important book category is remainders, promotional and bargain books (no used or hurt books are carried); although these books are published as markdowns and are stocked in many stores as discounted books, the clubs tend to offer lower prices than even the discount book chains. A spot check shows that while BJ's in East Rutherford was selling *Sargent* for $28.22, Barnes & Noble in New York City sold it for $39.98; an illustrated *Pinocchio* (from Unicorn Publishing) sold at BJ's for $11.97 vs. $14.41 at Barnes & Noble.

As a further enhancement to "perceived value," the clubs have become known for packaging or shrinkwrapping two or more low-end books together. In some cases, the packages contain a book and a nonbook item—a garnish cookbook with some garnishing tools, for example. A sample of BJ's packages includes: two $6.95 pop-ups from Random House, shrinkwrapped together for $9.82; the two Silver Palate cookbooks ($9.95 list each) at $16.17; an eight-pack of 99¢ coloring books at $5.59; and a pair of Louis L'Amour mass market paperbacks (listing at $2.95 each) marked $3.84.

Shoppers can't count on finding a specific book any more than a particular brand of toaster cover, but that's part of the warehouse experience.

Buying for the Clubs Advanced Marketing Services was founded in 1982 by Charles Tillinghast and two partners specifically to supply books to Price Club and others in the booming warehouse industry. Today AMS is by far the major supplier to the clubs and sells almost exclusively to them. Estimates of AMS's share of the market vary from 75% to 95%.

Tillinghast's background is in publishing. At one time, he headed CRM, the company that started *Psychology Today*; when CRM was sold, he founded Oaktree Publishing, a small San Diego press. Partner Craig Schafer, now vice-president of merchandising, had introduced books to the original Price Club while working with a periodical distributor in San Diego. Schafer supervises a buying staff of four: Allen Orso, hard-

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The Top Ten Membership Warehouse Clubs

	No. of Outlets	Sales Volume in Millions
Price Club, San Diego, Calif.	24	$1834 (2590, 8/86)
Sam's Wholesale Club (Wal-Mart Stores), Benningsville, Ark.	23	777
Costco, Seattle, Wash.	21	309
Makro, Cincinnati, Ohio	4	300
Pace, Aurora, Colo.	16	275
BJ's Wholesale Clubs (Zayre's) Natick, Mass.	(15)	215
Price Savers, Salt Lake City, Ut.	5	175
Value Club, San Antonio, Tex.	6	125
Warehouse Club, Niles, Ill.	7	(25.9)
SuperSaver, Monroe, La.	9	N/A

Last fiscal year figures reported or estimated by *Discount Store News* in a July 1986 report; figures in parentheses have been updated by *PW*.

cover bestsellers and basic reference; Cynthia Tillinghast (Charles's wife), cooking, travel and regional books; Anne Fontanesi, mass market and promotional books; and Donna Peterson, children's books and video. AMS's third partner, Loren Paulson, is vice-president of operations.

Those familiar with AMS describe the wholesaler as playing a very influential role in the warehouse clubs' book-buying decisions. "The clubs have a person responsible for buying books, but that buyer may be responsible for other categories as well," says Tillinghast, "and as a general rule they're looking to us to provide recommendations."

AMS is almost universally praised for its shrewd buying and its nearly uncanny ability to judge its market accurately. The company's four buyers are responsible for selecting the approximately 200 titles that are stocked at any one time. One reason for AMS's effective buying, observes one publisher who has sold to AMS, is that the buyers are also responsible for selling to accounts.

"They seem to know exactly what will work for each store and how many copies they have to sell per week to justify the floorspace," says Jean Scrocco, head of Unicorn Publishing House in Parsippany, N.J., who has sold several hardcover children's books to AMS. "If you have a good product and they like it, you don't have to wine and dine them or kill yourself to pitch it. They know their accounts very well."

Buys are generally made in high volume on a returnable basis. Substantial mistakes, however, are apparently rare. The company will sometimes test-market risky titles by placing a small order in a few outlets; successes or failures show up quickly in the high inventory turnover environment.

"Their [AMS's] returns were lower in 1986 than in 1985, and yet for most customers '86 was a big returns year," says Michael Pratt, vice-president of trade marketing and sales at Random House. "I think the reason is that they're dealing with many fewer titles. Compared to another book wholesaler that has 5000 or 10,000 titles, they're obviously going to know more."

From Outlet Book Company, AMS "generally buys nonreturnable" in quantities that "on occasion justify a whole print run," according to executive vice-president J. P. Leventhal. In some cases, publishers have also produced books or calendars on an exclusive, nonreturnable basis for the wholesaler.

Over the five years of its existence, AMS has been expanding along with the warehouse club industry. It started with a storage and holding center near its San Diego headquarters, but has since opened four other locations in San Francisco, Dallas, Atlanta and Baltimore. The firm now ships to 45 of the 50 states—all but Maine, Vermont, Wyoming and the Dakotas, Tillinghast says.

Opportunities for Small Presses Most major publishers and a growing number of smaller houses sell to AMS. "We will see anybody who has a product suitable for our marketplace," says Tillinghast. "We may deal with publishers who have only a single title, but we also deal with the Random Houses of the world."

With the small number of titles in stock, the wholesaler buys item by item, rather than taking an entire line. Even so, the orders can be impressive. At Random House, an order of 10,000 to 50,000 of a bestseller is the norm—plus sales of children's books, paperbacks and backlist, says Pratt, who declined to give dollar figures on the business.

Random House's sales reps in San Diego service the AMS account, though Pratt says "our sales management will visit periodically, and when they're in New York they stop in to see us." Orders for likely bestsellers are placed in advance: "If there's a James Michener coming out, they will want that and a lot of it," says Pratt. In iffy cases, "neither they nor we are interested in large risks. Where we usually sell up to six months in advance, we will probably wait closer to pub date and if it looks better, we may go back to them and they'll order."

Smaller publishers report that their books are given full consideration without in-person sales visits, based on catalogue copy and a sample. "After they've reviewed it and shown it to their accounts," says Scrocco of Unicorn, "they may take it in large quantities."

As a result, the warehouse industry offers a remarkable opportunity for small publishers with the right book, says Jan Nathan, executive of the Publishers Marketing Association, a California cooperative marketing organization with 600 small publisher members. "Out of the 2700 titles we list, maybe 30 a year would be right for that market," Nathan says. "But anyone would love to sell to them, because you really will get paid in 30–60 days, compared to the 120 days you get other places."

But Nathan cautions that the large orders can have a down side. Samples may be under consideration for months, she says, but "if they make a blanket purchase, you've got to be ready to send maybe 45,000 books in a month. Many small publishers don't have the capital to manufacture so many books so fast." And if the books don't sell (one publisher reported a return of 3000 on a 5000-copy buy), a small publisher could be in big financial trouble.

Tight deadlines can also pose problems. "You have to be ready to deliver on time. They may say the books have to be there on Tuesday, December 8, between 11:00 and noon. You'd better be prepared to fulfill for Charlie [Tillinghast]. If you're late, you'd better believe you won't get another chance."

Best Sellers Publishing Co. in Huntington Beach, Calif., which puts out children's books and cookbooks, has worked with AMS for several years. Publisher Dede Napoli praises the wholesaler as "super to work with," but she has had her share of frustration in trying to enter the warehouse market.

Shortly after setting up shop in 1984, she decided to package a Starving Student Survival Kit, using her *Starving Student Cookbook*, a frying pan and some novelty postcards asking Mom and Dad to "send money quick." (She had sold bookstore distribution rights on the book to Warner Books, but retained rights to sell an edition with a different cover into the gift and specialty market.) "We sent 400 kits to AMS, and they called back right away to say they needed at least 600 more in a few days. The trouble was, we were out of stock, so we couldn't do it. It's very tricky. You have to prepare yourself."

Competitors and Customers Some industry observers claim that the warehouse clubs pose little threat to booksellers because warehouse members do not tend to overlap with traditional bookstore customers. This may change, however, especially as competition between the warehouse chains heats up and if membership restrictions are eased.

"If there are enough of these warehouses, I think they definitely will take a bite out of the booksellers' market," says a Price Club member in the book business. "Particularly before Christmas and with bestsellers, you figure that if you can buy two books for the price of one somewhere else, it's worth it."

Ironically, some booksellers have joined the warehouse clubs as business members. One San Francisco area bookseller admitted he'd gone to a local Price Club and bought 15 copies of *A Day in the Life of America* just before Christmas, when booksellers everywhere were bewailing the title's out-of-stock status.

"We don't like to buy from them because they're competing with us, but I couldn't get delivery from our wholesaler," says the bookseller, who asked that his name not be used. "Of course, it's strictly luck. On Monday, the Price Club didn't have the book and didn't expect any, but when I went back the next day, the books were there."

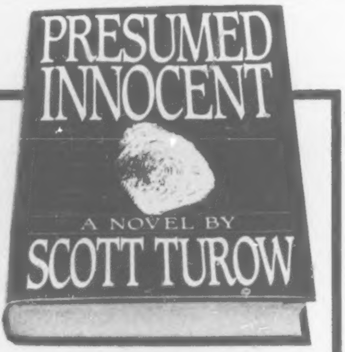
Price Club was selling *A Day in the Life* at a 41.5% discount off the $39.95 list. "You can return anything you don't sell in 30 days, with no penalty, and money back in cash," he points out. By contrast, he would have received a 43% discount from Ingram—if the title had been available—plus shipping.

"When I can't get a book from anyone else, I buy there, but I think it's bad for the independent bookseller. With these Price Clubs, customers get the idea that everything should be discounted"—or that all titles can be discounted that deeply.

A Look Ahead In the 11 years since the first Price Club opened, warehouse clubs have become the fastest-growing segment of the retail industry. Financial analysts attribute much of the rapid growth to the fact that the concept is new and that most stores have entire metropolitan markets to themselves. As clubs multiply and competition becomes more fierce, however, there is speculation that only the largest population centers will be able to support more than one warehouse club.

Competition for the clubs' book business is also increasing. Until recently, AMS has had much of the field to itself, along with a few other distributors. One is Handleman National Book Distributors (Troy, Mich.), which, according to vice-president Richard Sadlon, services Sam's Wholesale Club and the Warehouse Club, and Computer Book Service (owned by Charles Levy Circulating Co., Hillside, Ill.), which, according to sales vice-president Ed Luikaart, services several clubs. But other suppliers are discovering this highly specialized and lucrative market; with their rapid expansion, the clubs represent an area that wholesalers can enter in response to current pressures in the industry, not least of which is the loss of K mart business as Waldenbooks expands its internal distribution network.

Peggy Langstaff, vice-president of marketing and sales at Ingram Book Co., sums up the appeal of the wholesale club market: "We are watching it very carefully. It's a hard market to get into, the pricing is incredibly competitive. But it is appealing because of the volume, returns are negligible, and many of the membership warehouses are very credit-worthy." ☐



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What's New in Jerusalem: Projects, Writers & Publishers
The Flowering of Garden Books: New Life for Perennials
How-To Book Reviews • Index to January Forecasts

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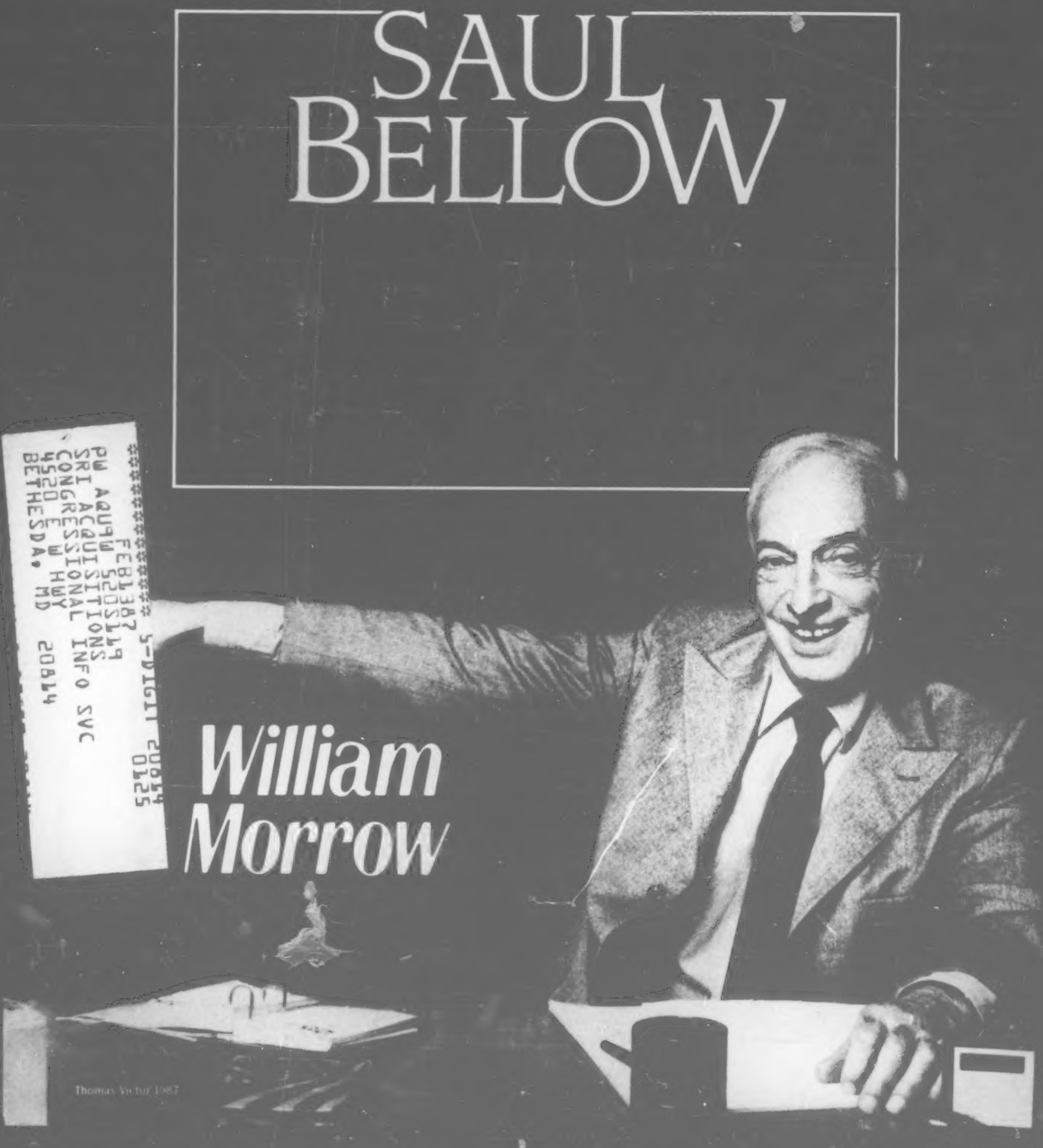
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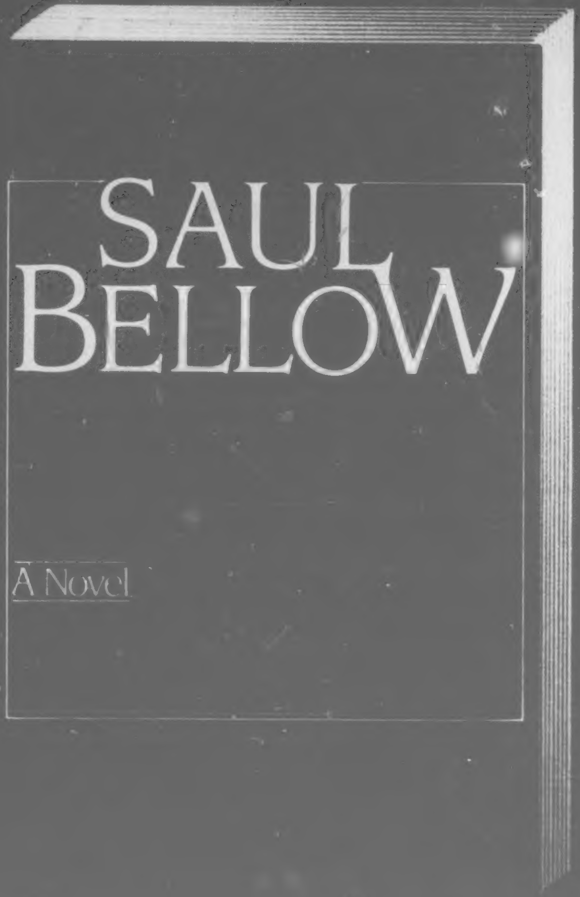

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HIGHLIGHTS

PW Offers New Look, New Coverage

An entirely redesigned *Publishers Weekly* makes its debut with this issue, and an Editorial describes the thinking behind it, as well as plans for a number of new ventures to be launched in the coming year. *Page 19*

New York Book Fair Will Close Down

The annual New York Book Fair, for 12 years an important showcase for the work of small presses, will take place for the last time at Columbia University April 17–19, says fair coordinator Suzanne Zavrian, who notes that the philosophy of smaller publishers has been moving away from such occasions. *Page 20*

LC Advises on Meese Proposals

A lawyer for the Library of Congress, analyzing the proposals of last year's so-called Meese Commission on Pornography, says that parts of the report "do not appear to fully reflect the limited governmental authority in this area." *Page 20*

VP Bush Criticizes Book Censorship

Vice-President George Bush, in an address to a religious broadcasters convention, urged "the need for tolerance" on those who would censor books children read. He spoke after Gary Bauer, President Reagan's new domestic policy adviser, had attacked textbook publishers for ignoring moral values. *Page 21*

Rosset to Copublish with Holt

Barney Rosset, former publisher at Grove, has formed Rosset and Company, and Henry Holt will copublish with him and distribute his books. The move reunites Rosset with Richard Seaver, Holt's head; the two were formerly colleagues at Grove, which Rosset sold to Ann Getty and George Weidenfeld. *Page 21*

New Authors, Projects in Israel

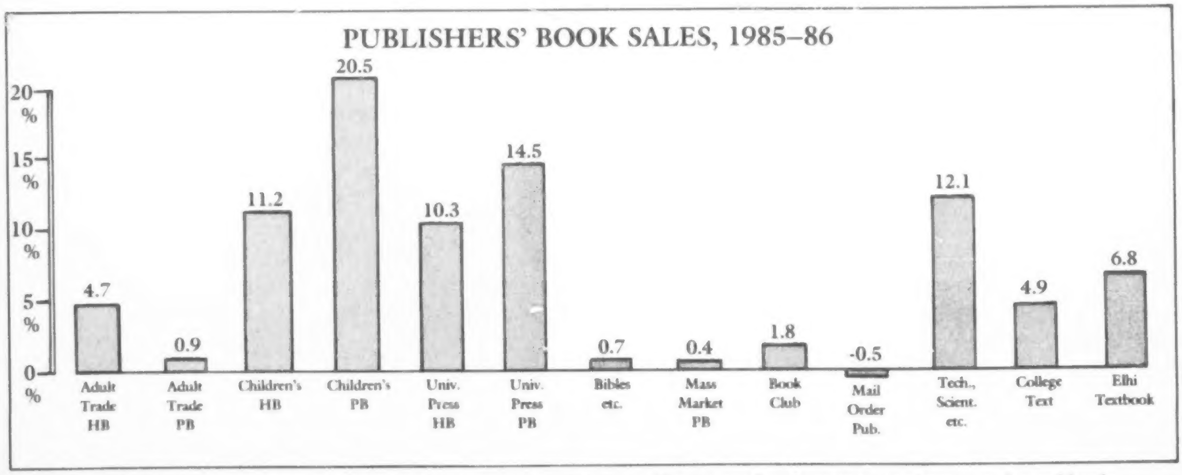
Publisher visitors to the biennial Jerusalem Book Fair in April will find a lively publishing/packaging scene, and a number of promising new authors; the theme of one symposium at the fair is translation. *Page 26*

Garden Books Grow with the Economy

A feature on the current state of the market in garden book publishing shows that low interest rates mean healthier sales—and that decorative flower gardening, with an emphasis on perennials, has edged out vegetables in coverage. *Page 37*

Gould to FSG; Crown Has New Imprint

Novelist Lois Gould, most recently published by Linden Press, will go to Farrar, Straus & Giroux for her new novel; the house will also reissue all her previous books. Crown has launched a new imprint, Orion Books, that will cover military history, air and space transportation, and technology. *Page 47*



PUBLISHERS' BOOK SALES, 1985–86

Year-end sales figures *from the AAP show change in percentages of losses and gains 1985–86 in a number of book categories; most were comparatively flat*

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Children's Books for Spring
Publishers Foresee a Rosy Future • Rising Sales Trends Projected
Screen to Book: The Changing Licensing Picture • Minnesota Is Kids' Country

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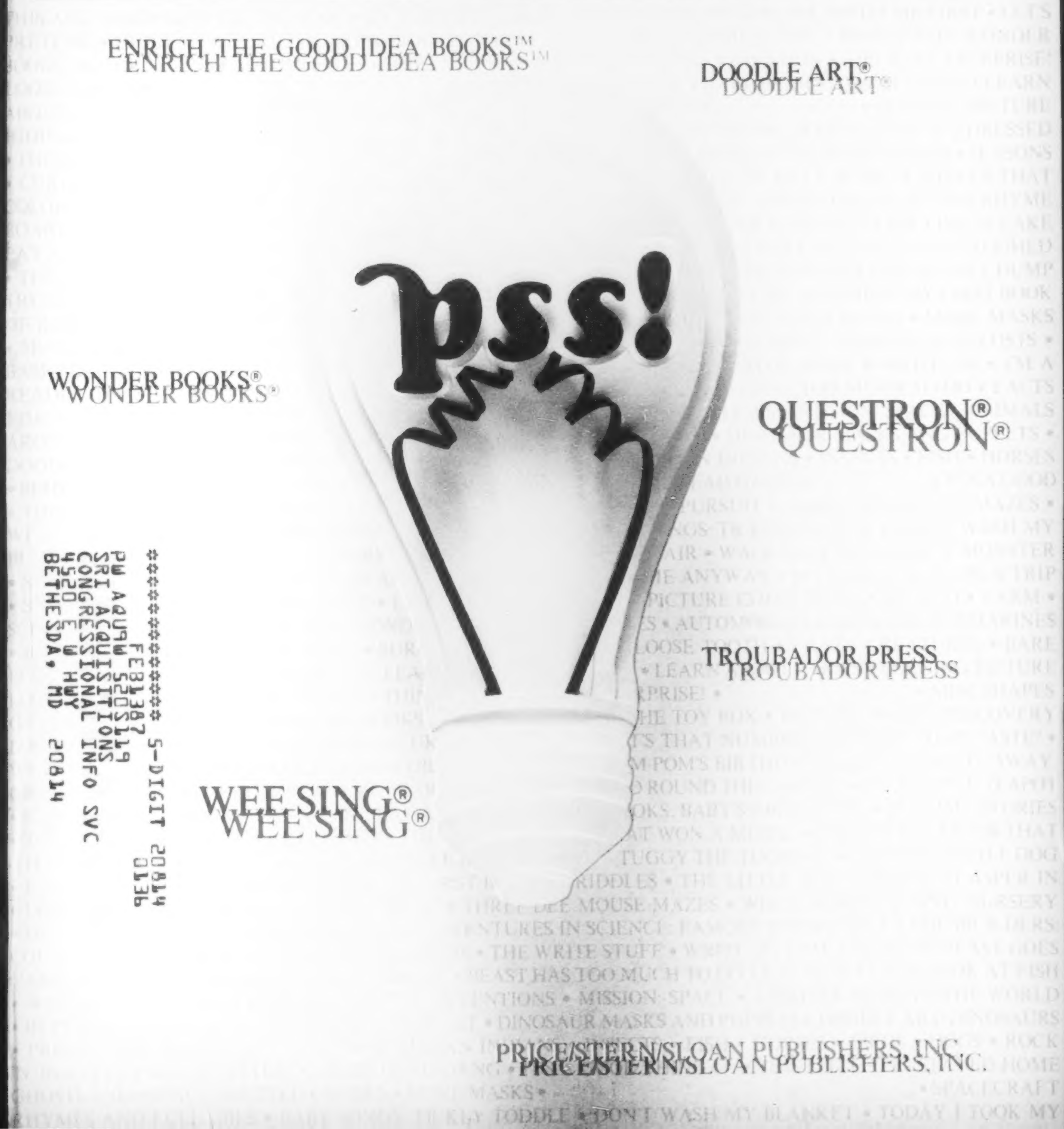

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'Glorious Years' Ahead for Children's Books

Some key industry figures share their (mostly optimistic) views of the future market in a special PW Survey

Marc Cheshire
Editorial Director,
Books for Young Readers,
Henry Holt & Co.
The reason children's book sales have increased is the mini-baby boom of the last five years. The kids of the first baby boom generation are having kids of their own. These parents are the most highly educated generation of Americans, and they understand the importance of knowing how to read. They want to take an active role in their children's education and are willing to spend money on that—that includes buying them good books. At the moment they've been buying a lot of preschool books, but as those kids get older we'll see a lot of demand for easy readers and middle grade books. In bookstores that demand is going to be for paperbacks.

I think we'll also see increased competition among publishers. New companies will enter the children's book market, but a lot of those people will enter for the wrong reasons: they're reading the statistics but don't know enough about the children's book business to make it work. What's really selling today is quality, and the decision on the part of the bookstore buyer and the parent has to do with whether the books are good or not, more than their price or format.

Walter Lorraine
Vice-President and Director,
Children's Trade Books,
Houghton Mifflin
The next five years will be glorious years for readers of children's books, publishers, librarians, booksellers and teachers alike. And it's been a long time in coming. Parents will have more direct access to the quality books that are being published for young readers, through the retail outlets, and perhaps further down the line, through the classrooms. It seems evident that reading in the schools is intensifying a focus on literature, rather than just on skills. We'll still do books for the library market, but now the audience has broadened and we're bringing parents more directly into the equation, without losing one whit of the high quality of content that librarians have always demanded.

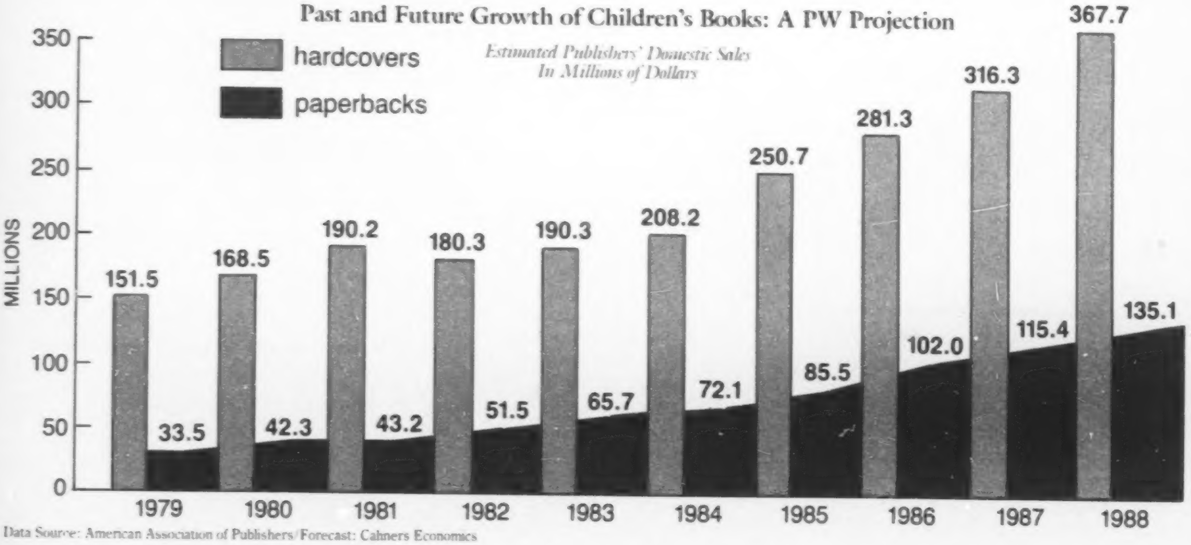
Liz Gordon
Vice-President and Publisher,
Harper Junior Books Group
You can't look at the marketplace and at publishing without looking at cultural factors. Parents these days are better educated, have more disposable income, fewer children to spend that income on, and the desire to see their children do well educationally. In this sophisticated marketplace, that still doesn't mean people will go into a bookstore and buy hardcovers in quantity. They *will* buy paperbacks if they think the quality is there. But the key to publishing paperbacks is having a superb hardcover publishing program. You have to make an investment in a longterm process. In order to publish quality books, a publisher must take the long view and look for true writers, not books that capitalize on short-term trends. Publishing books that will still be here 10 years from now is profitable for a publisher, and it also happens to be the way I like to publish.

George Nicholson
Vice-President and Editorial
Director, Books for Young Readers,
Dell/Delacorte
The sales reps are telling us no more series, that the buyers don't want them. Whether the kids want them is another question. The big series seem to be holding, though there's been nothing new that's caught anyone's imagination. The real question is, can a publisher launch, at considerable expense, a new series at *X* number of books a month for two or three years? It's a massive expenditure even if you completely trust your sales force.

The toughest problem that paperback houses face is determining who we are. We're all very different from each other. And the hardcover houses have to determine what they want to do—they can't reach potential growth areas in YA, which are in nonbook outlets. We haven't begun to realize potential sales in those outlets. Most of us have fairly modest return rates, and we've been afraid to let returns rise. But there's also the line of argument that we haven't been adventurous enough. Finally, as hardcover houses pull back their standard backlist titles, paperback houses will become more aggressive about acquiring established authors.

Bruno Quinson
President, General Books
Division, Macmillan
We feel that for the next 5 to 10 years, children's books are a growth market. We're doing seven times the business we were four years ago, and have no plans to cut back on children's books. And we see three areas for growth. First, we plan to grow in the traditional hardcover publishing area, with new picture books for both the library and bookstore market, as well as bring back some of the wonderful backlist books that may be out of print. Next, we'll continue our aggressive paperback programs. And finally, we're gearing toward publishing more toward bookstores. Our traditional business—the library market—is very important to us and we'll continue to publish for it, but the retail market has become very important as well. More and more working parents have children but have less time to spend with them, and those parents want to buy books that are both educational and fun, to read to them at night. We're going after that market.

John Keller
Publisher, Children's Books,
Little, Brown & Co.
We're never going to say goodbye to board books and cloth books, but big-ticket items are going to come increasingly to the fore. Lavish retail picture books with the right names of authors and artists will succeed, and there will be more of them. I think people are no longer afraid to part with a buck—the shock of the prices has worn off. If you're paying $12 for a 32-page picture book and you can get a 96-page collection of terrific po-



Past and Future Growth of Children's Books: A PW Projection

Estimated Publishers' Domestic Sales In Millions of Dollars

Data Source: American Association of Publishers/Forecast: Cahners Economics

ems with great pictures for $20, I think people are ready to take that plunge.

I see a pretty healthy children's book picture over the next five years. If there is such a thing as straight institutional books (though there's less of that than ever before), even they will benefit from this. What's good for retail will also be good for the institutional market.

Jean Feiwel
Editor-in-Chief and Divisional Vice-President, Scholastic

The reprint business, as it used to be, has fallen away almost completely, as hardcover houses retrieve the rights to books they once sold. This has significant impact on not only our backlist but also our frontlist. It causes me to look more aggressively for hardcover authors we also can publish in paperback. And we have to find new talent and begin to develop those people we see as the future of the children's book world.

We want to become full-line publishers and do every kind of book for every marketplace we publish to. I see competition in every area: the hardcover business—which we're new to—trade paperbacks, the book clubs. Younger and middle readers can be hot at the moment, where the aggressive acquiring is going on, but I have to keep my eye on the ball in other areas. I feel like our publishing programs at Scholastic cover all the ages, and if I let one go I'll leave a flank exposed across the market where someone else could make inroads.

John Briggs
President, Holiday House

The most exciting part of this big renaissance in children's publishing has been in the public's recognition of the value of good children's books, and we're publishing with the expectation that this will continue. We're going to continue to do quality but not elitist books for a market we think will keep on growing. We'll do more classic but also more innovative picture books compared with the past. We'll also publish more fiction for middle and older readers than we have, more nonfiction for all ages, and we'll continue to publish Judaica and poetry.

David Allender
Editorial Director,
Crown Books for Young Readers

Children's books will become bigger and bigger business. The key question is whether we can rise to this occasion by creating increasingly excellent and truly original books. A similar sales boom in the '50s and '60s led to a revolution of quality that is still with us. Now it's our turn.

Stephen Roxburgh
Vice-President and Publisher,
Books for Young Readers,
Farrar, Straus & Giroux

The biggest development I see is in full-color picture books in trade paperback. We're seeing very high quality production standards at higher than mass market prices, and we're doing very well with it.

What we'll continue to see is aggressive retail as opposed to institutional marketing of lists by trade publishers. More and more publishers will be doing the kinds of things paperback publishers have been doing forever. We're not going to ignore the library market but we have to find other outlets.

I'm delighted with the renewal of interest in historical or period fiction. Genre books have peaked and now reprinters and trade houses are discovering that they can publish what may have been out of style 10 years ago. The sad news is that YA hardcover fiction is in the worst shape it's ever been. It may be that the most appropriate form for the genre is in paperback. Except for writers who are well established, it's quite difficult to take on new hardcover YA fiction, especially if it's of a serious subject nature. I find that very sad because we're quite committed to that form.

Betsy Gould
Associate Publisher,
Bantam Books for Young Readers and Young Adults

I believe that the series boom is going to level off. Publishers have competed against each other to such an extent that we've probably sped that along. At Bantam, we'll be concentrating on developing our backlist, for *all* ages. We'll be doing hardcover originals. We have our first group of book-and-tape packages coming out. We'll also be launching a line for toddlers and preschoolers, though that area too is becoming very competitive. We'll be taking those books beyond the traditional bookstore—to toy stores, convenience stores, some of the big merchandisers. And we're expanding our continuity program to the supermarkets.

Christopher Franceschelli
Vice-President and Publisher,
Dutton Children's Books (as of March 1)

Marketing of children's books will become increasingly savvy—much more refined than just large sums of money committed to chain catalogue ads. In no small measure, that is due to the independent booksellers, who are playing an ever more important role, displaying a professionalism and knowledgeability that we once expected only from librarians.

Though it has become increasingly vital for publishers to integrate vertically, many publishers may need to rethink some of the policies that caused a rush into trade/mass market publishing. That's not to say that it can't be done successfully, only

> 'For the next five to 10 years children's books are a growth market. We're doing seven times the business we were four years ago'
>
> Bruno Quinson

that the practices of trade publishing aren't necessarily applicable to mass market, and vice versa.

I believe that there is a real future to nonfiction publishing in the trade. We as an industry have been guilty of fulfilling our own prophecy that nonfiction doesn't sell, by all too often packaging books to look like relics of the '50s. Presented correctly, nonfiction books have every bit of the appeal of picture books.

Doris Duenewald
Publisher, Golden Books
I think we'll see more back-to-basics—good stuff that will make good backlist books. Recently so many of the licensed books have not been successful that publishers are getting wary. We'll be doing fewer than before. When you have so much emphasis on licensing and frontlist, when you're putting so much money into it, there's a tendency to let the backlist slip a little. We'll see more emphasis on math and science books. There's a bit of a dinosaur craze going on, which is amusing because dinosaur books have always sold extremely well. And the market for books for the very young has gotten so full that we'll start seeing more books for the six-to-nine age level.

Dorothy Briley
Editor-in-Chief, Lothrop,
Lee & Shepard; Vice-President,
William Morrow and Co.
The demand for books to share with infants and toddlers is not apt to slow down. Added to this market or the extension of it are those educated and discriminating parents whose children are more than six years old. I see a trend toward beautifully and well-produced nonfiction. We should also remember that many of these carefully nurtured children will be bookstore customers sooner rather than later. The nine- or 10-year-old child as customer will be a new experience for publishers and booksellers accustomed to having adults choose the majority of books for children. We should be prepared for the possibility that young customers may say no to some books that adults would choose for them, and yes to others that adults would doubt that a child could understand or enjoy.

Edward Davis
Vice-President and Managing
Director, Simon & Schuster
Juvenile Division
Clearly we're in an expanding market. I'm seeing a lot less price resistance from the wholesalers than a year ago, and that will continue. Parents are starting to look at a children's book as a bargain. They won't balk at the price *if* the book delivers.

But we have to be careful not to say that if the market is rosy for children's books, that means anything will sell. Stores are being very selective and the customers are too. I see very little future for gimmick and novelty books that don't deliver more than just gimmicks and novelty.

Regina Hayes
Vice-President and Editorial
Director, Viking Penguin
Children's Books
While I hope we can always be commercial and pick up some of the trends kids want, it's necessary to remember the importance of good art direction and editorial strength. If you have that strength you can use material in a million different ways. And if you don't have a core of first-rate material, you have nothing to work with. We keep coming back to the issue of quality. It doesn't mean you can't do something timely and topical and commercial, but we're still drawing on those books like *Ferdinand* and *Madeline* from 50 years ago, and we hope we'll have books like those 50 years down the road.

Sandra Jordan
Editor-in-Chief, Orchard Books
I think that picture books will continue to hold preeminence in stores because of their immediate appeal. You don't need a review to choose a picture book. But the market is saturated with books that promise more than they deliver, and there's a growing demand that the contents of the book match the beauty.

Beyond that, humorous middle grade fiction, poetry, handsomely produced nonfiction, historical novels and picture books with strong texts all look like strong areas for the next few years. Above all, it seems to me that people are tired of flashy books and TV tie-ins, and are interested in quality. That's always been at the heart of the children's book industry; good books are good business.

Gerald Harrison
Executive Vice-President,
Juvenile Division, Random House
We're seeing that frontlist is more important than ever before. Creating new backlist is very, very hard. You want more than one year's life out of a book and that's hard. The business is much more competitive than it was a few years ago. Every time a publisher is successful with one line of books, five others come in and do the same thing. It's harder to establish a new title and a new author. On the good side, children's books are much more widely available these days. We're selling more books in more places than ever before.

> 'The market is saturated with books that promise more than they deliver, and there's a growing demand that the contents of the book match the beauty'
>
> Sandra Jordan

Rubin Pfeffer
Editor-in-Chief, Trade Department,
Harcourt Brace Jovanovich
Since 1984 we've doubled the amount of books we publish for children. We are attempting to do books that are lower priced so that they can get into a wider market. We'll be relaunching our Voyager paperback line, and reissuing picture books and novels in paperback. There's a new market for the classics, and we're updating the packaging to meet new tastes. We'll do more than we used to in terms of simultaneous publishing, in response to both the library and the bookstore markets.

Margaret Frith
Senior Vice-President and Publisher,
Putnam Young Readers Group
As children's books have come into their own, and as publishers who have not been in the business before continue to dive in, I see the next five years as strong and successful for those who understand what a good book is, and who publish quality books with lasting child appeal. Along with publishing the best for children, one must have a committed sales and marketing department capable of reaching wider markets. At Putnam, we now have a unique opportunity for cross-marketing our books with a range of child-related products, with the acquisition of Family Line and American Publishing. We can get books into areas we haven't been in before, or areas we haven't been in as deeply as we'd like. Ten years ago we were strictly a children's book division of Putnam's; we still are, but the opportunity of getting our books to a wider audience of children has never been better.

—DIANE ROBACK

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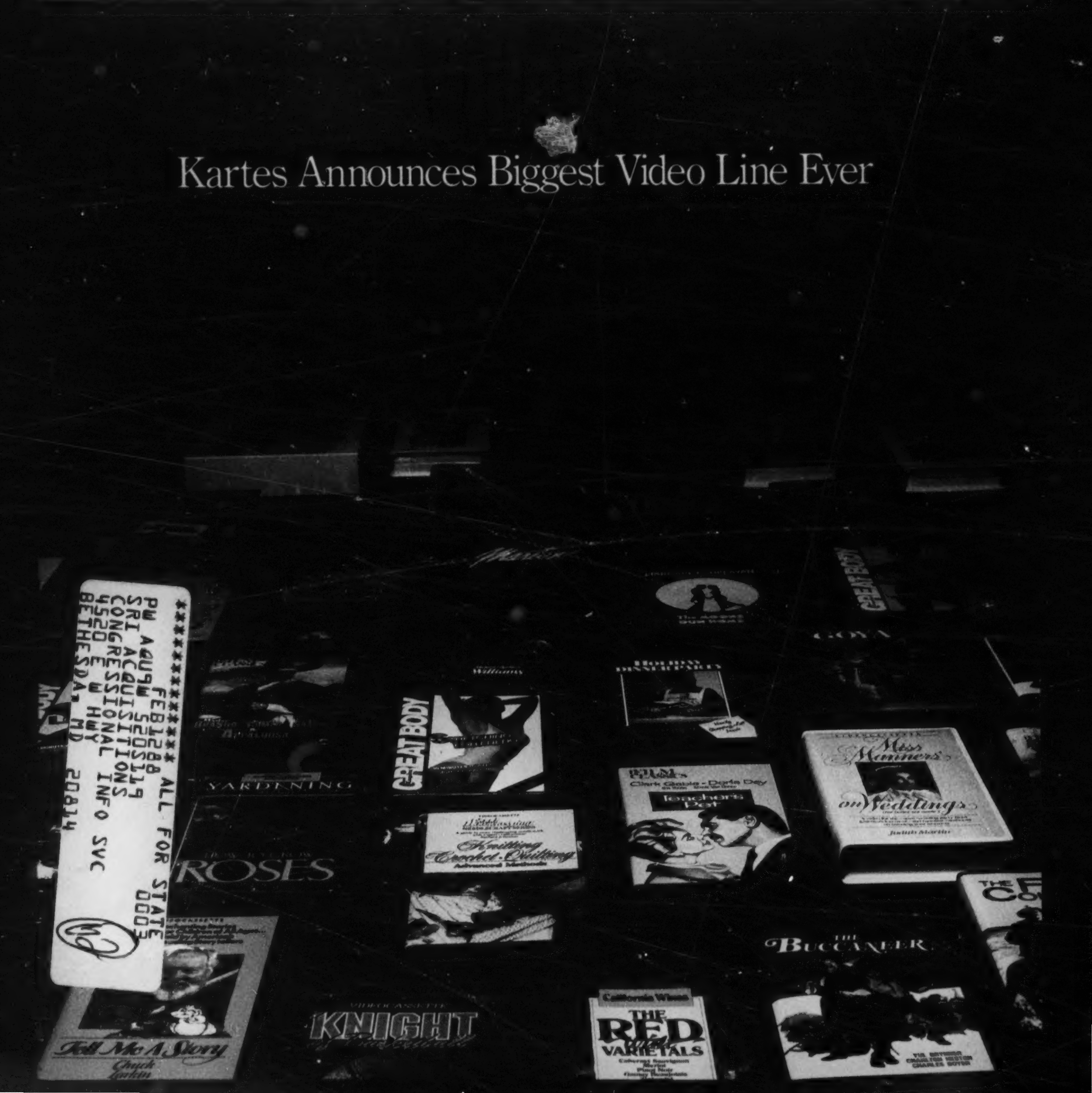
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1986: The Year in Review

Title Output Level, Prices Stabilized

Preliminary annual estimates show little change in book production, only modest price increases

BY CHANDLER B. GRANNIS

U.S. book title output appears to have leveled off somewhere between 50,000 and 51,000 in 1986—possibly even more—to judge from preliminary data compiled by the R. R. Bowker Co. Average prices of books, on the whole, seem to have increased only modestly compared with the previous year, according to the preliminary computations. (Final figures for 1986 will be published in *Publishers Weekly* late in the summer.)

The 1985 book output, according to final Bowker figures, came to just over 50,000, a decline of about 1.5% from the 1984 total of 51,058—which was 4.3% below 1983 total of 53,380, an all-time record in the Bowker calculations.

Two Bowker sources are used in compiling the title counts and price averages. The database of Bowker's

TABLE 1

AMERICAN BOOK TITLE PRODUCTION

CATEGORY*	1984	1985				1986 PRELIMINARY			
	ALL HARD & PAPER	HARD & TRADE PAPER			ALL HARD & PAPER	HARD & TRADE PAPER			ALL HARD & PAPER
		Books	Editions	Totals		Books	Editions	Totals	
Agriculture	507	450	79	529	536	371	70	441	445
Art	1,838	1,392	150	1,542	1,545	1,170	143	1,313	1,316
Biography	2,098	1,604	270	1,874	1,953	1,435	222	1,657	1,729
Business	1,696	1,142	350	1,492	1,518	994	324	1,318	1,349
Education	1,052	885	188	1,073	1,085	720	113	833	841
Fiction	5,413	2,290	291	2,581	5,105	2,192	320	2,512	4,877
General Works	3,021	2,549	270	2,819	2,905	1,681	226	1,907	1,970
History	2,257	1,913	383	2,296	2,327	1,567	337	1,904	1,936
Home Economics	1,306	999	128	1,127	1,228	714	83	797	894
Juveniles	3,128	3,183	191	3,374	3,801	3,200	152	3,352	3,812
Language	670	519	99	618	632	439	106	545	562
Law	1,406	1,036	307	1,343	1,349	781	293	1,074	1,077
Literature	2,006	1,669	260	1,929	1,964	1,492	275	1,767	1,800
Medicine	3,554	2,925	618	3,543	3,579	2,225	465	2,690	2,731
Music	387	277	78	355	364	217	65	282	292
Philosophy, Psychology	1,554	1,220	227	1,447	1,559	1,079	208	1,287	1,369
Poetry, Drama	1,164	1,075	75	1,150	1,166	977	54	1,031	1,056
Religion	2,482	2,211	329	2,540	2,564	1,942	247	2,189	2,212
Science	3,236	2,808	481	3,289	3,304	2,086	471	2,557	2,570
Sociology, Economics	7,794	6,285	1,112	7,397	7,441	5,562	864	6,426	6,471
Sports, Recreation	1,299	876	129	1,005	1,154	684	119	803	962
Technology	2,639	2,079	405	2,484	2,526	1,715	359	2,074	2,110
Travel	551	366	90	456	465	313	89	402	412
TOTAL	51,058	39,753	6,510	46,263	50,070	33,556	5,605	39,161	42,793

NOTE: Figures for mass market paperbound book production are based on entries in *Paperbound Books in Print*. Other figures are from the *Weekly Record (American Book Publishing Record)* database. The heading, "Books," refers to brand-new titles; "Editions" refers to new or revised editions.

TABLE 2

PAPERBACKS (EXCLUDING MASS MARKET)

CATEGORY	1984	1985			1986 PRELIMINARY		
	TOTALS	NEW BOOKS	NEW ED'NS	TOTALS	NEW BOOKS	NEW ED'NS	TOTALS
Fiction	518	365	71	436	287	70	357
Nonfiction	14,649	12,520	2,383	14,903	10,356	2,059	12,415
TOTAL	15,167	12,885	2,454	15,339	10,643	2,129	12,772

Weekly Record/American Book Publishing Record supplies the figures for hardcover books and trade paperbacks. The new entries in the annual *Paperbound Books in Print* index provide the title counts and price averages of mass market paperbacks.

For hardcover books and trade paperbacks, the *WR/ABPR* database provides information both for brand-new books and new editions; it also includes data about imports and translations. (None of this breakdown information is available from the PBIP database.)

Table 1, which shows overall title counts by subject category, does not separate hardcover books from trade paperbacks but combines the figures. It should be especially noted that the last (fourth) column on the right in Table 1 is headed "All Hard & Paper" and combines the figures for hardcover books, trade paperbacks and mass market paperbacks.

Table 2 provides title counts of trade paperbacks—i.e., paperbacks other than mass market—by category. Table 4 reports import totals by category, and Table 5 gives a partial enumeration of translations, according to the languages from which the books were translated. It is hoped that the final report for 1986 will include a more comprehensive count of titles and figures on additional languages of origin.

Table 3 shows mass market paperback output totals by category.

Price-average tables show, in Table A, hardcover prices per volume, and in Table A-1, hardcover prices excluding volumes priced at $81 or more—that is, eliminating the relatively few extremely high unit prices that would skew the averages. Table B covers mass market price averages. Table C deals with the other paperbacks, giving also an indication of relative output by categories. Table D, a hand-produced compilation, is based on the prices of books advertised in the Fall Announcements issues of *PW* in three broad areas of mainly retail and public or university library interest.

Most of the tables here show breakdowns into the 23 Dewey Decimal subject classifications used in libraries. ☐

TABLE 3
MASS MARKET PAPERBACKS

CATEGORY	1984 FINAL	1985 FINAL	1986 PRELIM.
Agriculture	2	7	4
Art	3	3	3
Biography	75	79	72
Business	22	26	31
Education	5	12	8
Fiction	2,663	2,524	2,365
General Works	66	86	63
History	25	31	32
Home Econ.	83	101	97
Juveniles	257	427	460
Language	23	14	17
Law	6	6	3
Literature	57	35	33
Medicine	29	36	41
Music	3	9	10
Philos., Psych.	85	112	82
Poetry, Drama	9	16	25
Religion	14	24	23
Science	53	15	13
Sociol., Econ.	45	44	45
Sports, Recr.	181	149	159
Technology	85	42	36
Travel	12	9	10
TOTAL	3,803	3,807	3,632

TABLE 4
IMPORTED TITLES
HARD & TRADE PAPER ONLY

CATEGORY	1984	1985			1986 PRELIM.		
	TOTALS	BOOKS	ED'NS	TOTALS	BOOKS	ED'NS	TOTALS
Agriculture	103	101	17	118	86	3	89
Art	61	157	9	166	139	6	145
Biography	240	188	28	216	133	20	153
Business	140	120	26	196	115	15	130
Education	190	207	4	211	174	5	179
Fiction	164	155	16	171	148	13	161
General Works	268	312	17	329	241	19	260
History	324	348	47	395	231	35	266
Home Econ.	41	36	5	41	27	4	31
Juveniles	69	87	5	92	88	4	92
Language	179	200	16	216	177	19	196
Law	158	147	23	170	110	24	134
Literature	238	246	21	267	197	15	212
Medicine	508	531	67	598	447	47	494
Music	54	64	6	70	46	5	51
Philosophy, Psychology	211	257	10	267	195	15	210
Poetry, Drama	174	203	17	220	177	8	185
Religion	160	153	20	173	100	7	107
Science	1,032	1,121	121	1,242	803	122	925
Sociology, Economics	1,373	1,421	138	1,559	1,150	115	1,265
Sports, Recreation	137	95	12	107	78	9	87
Technology	454	364	55	419	439	54	493
Travel	61	56	5	61	30	8	38
TOTAL	6,337	6,669	680	7,349	5,331	572	5,903

TABLE 5
TRANSLATIONS INTO ENGLISH
HARD & TRADE PAPER ONLY

	FRENCH	GERMAN	RUSSIAN	SPANISH	ITALIAN	JAPANESE	DUTCH	LATIN	HEBREW	SWEDISH	DANISH	YIDDISH	NORWEGIAN	ARABIC	FINNISH	OTHER	TOTAL
1984 Final	355	425	181	97	97	64	38	42	28	21	27	10	4	16	10	N/A	1,439
1985 Final	416	369	182	86	92	59	40	30	29	28	17	15	13	8	5	N/A	1,389
1986 Prelim.	382	359	139	74	83	104	40	32	39	22	24	11	8	16	3	N/A	1,336

NOTE: "Total" covers only the languages listed here.

TABLE A

HARDCOVER AVERAGE PER-VOLUME PRICES*

CATEGORY	1977	1984		1985		1986 PRELIM.		
	PRICES	VOLS.	PRICES	VOLS.	PRICES	VOLS.	TOTAL	PRICES
Agriculture	$16.24	359	$34.92	368	$36.77	311	$ 11,760.13	$37.81
Art	21.24	1,114	33.03	908	35.15	776	26,369.03	33.98
Biography	15.34	1,408	22.53	1,298	22.20	1,138	25,560.40	22.46
Business	18.00	1,116	26.01	1,040	28.84	938	28,448.46	30.32
Education	12.95	580	24.47	602	27.28	446	11,430.78	25.62
Fiction	10.09	1,989	14.74	1,800	15.29	1,772	29,000.38	16.36
General Works	30.99	1,602	35.61	1,632	37.91	1,203	44,588.04	37.06
History	17.12	1,432	27.53	1,506	27.02	1,239	34,404.06	27.76
Home Economics	11.16	655	15.70	594	17.50	419	7,970.71	19.02
Juveniles	6.65	2,398	10.02	2,529	9.95	2,558	26,891.81	10.51
Language	14.96	410	22.97	347	28.68	293	8,960.43	30.58
Law	25.04	925	43.88	955	41.70	746	35,825.33	48.02
Literature	15.78	1,243	23.57	1,181	24.53	1,118	28,415.30	25.41
Medicine	24.00	2,836	40.65	2,798	44.36	2,063	98,314.39	47.65
Music	20.13	232	27.79	238	28.79	181	5,856.59	32.35
Philosophy, Psychology	14.43	895	29.70	895	28.11	799	23,173.87	29.00
Poetry, Drama	13.63	599	26.75	563	22.14	495	11,736.70	23.71
Religion	12.26	1,118	17.76	1,100	19.31	932	20,117.38	21.58
Science	24.88	2,535	46.57	2,556	51.19	1,935	103,698.10	53.59
Sociology, Economics	29.88	5,066	33.35	4,761	33.33	4,095	121,605.78	29.69
Sports, Recreation	12.28	623	20.16	530	23.43	426	10,031.35	23.54
Technology	23.61	1,797	45.80	1,693	50.37	1,501	79,695.95	53.09
Travel	18.44	252	21.31	210	24.66	177	4,112.30	23.23
TOTAL	$19.22	31,184	$29.99	30,104	$31.46	25,561	$797,967.27	$31.21

*From *Weekly Record* Listings of Domestic and Imported Books

TABLE A-1

HARDCOVER AVERAGE PER-VOLUME PRICES—LESS THAN $81

CATEGORY	1983	1984		1985		1986 PRELIM.		
	PRICES	VOLS.	PRICES	VOLS.	PRICES	VOLS.	TOTAL	PRICES
Agriculture	$27.76	333	$28.85	337	$29.99	289	$ 9,252.03	$32.01
Art	26.77	1,041	28.90	868	30.35	752	23,084.58	30.69
Biography	19.77	1,393	20.91	1,282	20.81	1,128	24,338.40	21.57
Business	24.02	1,103	24.74	1,024	27.27	915	25,566.16	27.94
Education	21.32	576	21.81	598	24.02	445	11,335.78	25.47
Fiction	14.14	1,987	14.49	1,799	15.24	1,766	27,940.38	15.82
General Works	26.12	1,530	26.97	1,561	29.05	1,154	36,059.64	31.24
History	23.85	1,401	23.89	1,487	25.41	1,223	32,197.06	26.32
Home Economics	14.53	654	15.53	591	17.11	416	7,699.21	18.50
Juveniles	9.15	2,394	9.75	2,529	9.95	2,556	26,602.82	10.40
Language	25.26	406	22.96	343	27.61	288	8,408.43	29.19
Law	30.25	854	31.60	888	35.87	677	24,809.83	36.64
Literature	21.31	1,230	21.69	1,169	23.46	1,107	26,779.30	24.19
Medicine	33.02	2,601	33.93	2,505	36.29	1,776	65,052.13	36.62
Music	24.06	240	25.01	236	27.72	178	5,591.64	31.41
Philosophy, Psychology	25.08	880	25.22	886	27.34	792	22,155.87	27.97
Poetry, Drama	19.39	588	19.32	554	20.90	493	11,301.70	22.92
Religion	15.93	1,111	16.30	1,096	18.88	927	18,598.43	20.06
Science	36.49	2,265	37.71	2,232	40.06	1,620	65,048.57	40.15
Sociology, Economics	24.83	4,977	25.48	4,689	27.91	4,045	114,478.48	28.30
Sports, Recreation	10.07	618	19.27	525	21.36	425	9,281.35	21.83
Technology	34.16	1,629	35.77	1,507	38.60	1,294	50,956.49	39.37
Travel	18.36	248	18.92	207	22.07	177	4,112.30	23.23
TOTAL	$24.15	30,059	$24.66	28,913	$26.57	24,443	$650,650.58	$26.61

TABLE B

MASS MARKET PAPERBACKS AVERAGE PER-VOLUME PRICES

CATEGORY	1984	1985		1985 FINAL		
	PRICES	VOLS.	PRICES	VOLS.	TOTAL	PRICES
Agriculture	$2.85	7	$5.76	4	$24.35	$6.09
Art	8.28	3	9.80	3	29.40	9.80
Biography	4.45	79	4.81	72	378.10	5.25
Business	4.91	26	7.57	31	239.45	7.72
Education	5.15	12	6.07	8	50.70	6.34
Fiction	3.02	2,524	3.24	2,365	8,249.05	3.49
General Works	4.58	86	4.64	63	316.05	5.02
History	3.77	31	5.38	32	166.85	5.21
Home Economics	4.94	101	5.65	97	609.25	6.28
Juveniles	2.31	427	2.71	460	1,246.25	2.70
Language	5.55	14	4.28	17	96.80	5.69
Law	5.11	6	6.62	3	13.40	4.46
Literature	3.62	35	4.76	33	169.35	5.13
Medicine	5.01	36	6.65	41	296.80	7.24
Music	5.28	9	5.67	10	42.05	4.20
Philosophy, Psychology	4.38	112	4.22	82	416.05	5.07
Poetry, Drama	5.10	16	4.88	25	144.65	5.78
Religion	3.87	24	3.21	23	97.45	4.24
Science	3.55	15	4.83	13	78.45	6.03
Sociology, Economics	4.42	44	4.76	45	248.65	5.53
Sports, Recreation	4.06	149	3.80	159	643.70	4.04
Technology	8.61	42	12.29	36	443.60	12.32
Travel	5.86	9	4.93	10	50.15	5.02
TOTAL	$3.41	3,807	$3.63	3,632	$14,050.55	$3.87

TABLE C

TRADE PAPERBACKS AVERAGE PER-VOLUME PRICES

CATEGORY	1977	1984		1985		1986 PRELIM.		
	PRICES	VOLS.	PRICES	VOLS.	PRICES	VOLS.	TOTAL	PRICES
Agriculture	$5.01	131	$27.05	198	$9.50	115	$1,508.53	$13.11
Art	6.27	671	13.13	593	14.04	492	7,495.78	15.23
Biography	4.91	560	15.09	536	10.78	475	5,555.99	11.69
Business	7.09	506	17.10	425	16.83	348	6,322.45	18.16
Education	5.72	433	12.84	440	12.98	351	4,870.87	13.87
Fiction	4.20	696	8.95	726	13.66	700	5,954.12	8.50
General Works	6.18	1,286	14.32	1,123	19.13	628	14,443.04	22.99
History	5.81	744	13.49	729	14.08	608	8,818.62	14.50
Home Economics	4.77	544	9.40	513	9.22	358	3,503.87	9.78
Juveniles	2.68	412	5.94	767	5.20	721	4,232.18	5.86
Language	7.79	219	11.60	252	13.25	241	3,446.85	14.30
Law	10.66	371	17.61	339	18.46	277	4,761.57	17.18
Literature	5.18	652	11.70	694	14.04	614	8,196.58	13.34
Medicine	7.63	651	15.78	698	16.01	567	11,193.91	19.74
Music	6.36	136	12.53	113	12.20	94	1,364.45	14.51
Philosophy, Psychology	5.57	540	13.64	523	13.25	459	6,246.25	13.60
Poetry, Drama	4.71	511	8.88	550	8.86	50[illegible]	5,025.10	10.03
Religion	3.68	1,314	9.32	1,373	9.30	1,197	11,128.02	9.29
Science	8.81	589	16.22	677	19.78	550	12,840.34	23.34
Sociology, Economics	6.03	2,481	17.72	2,402	16.30	2,139	36,258.09	16.95
Sports, Recreation	4.87	467	11.40	447	10.66	354	4,026.05	11.37
Technology	7.97	692	21.11	722	21.08	510	13,790.20	27.03
Travel	5.21	274	9.88	235	10.48	214	2,373.10	11.08
TOTAL	$5.93	14,880	$13.86	15,075	$13.98	12,513	$183,355.96	14.65

TABLE D

THREE HARDCOVER CATEGORIES—*PW* FALL ANNOUNCEMENT ADS

NOVELS*	AVG.	MED.	BIOGRAPHY**	AVG.	MED.	HISTORY***	AVG.	MED.
1986—305 vols./53 pubs.	$17.13	$16.95	1986—125 vols./53 pubs.	$22.28	$19.95	1986— 73 vols./24 pubs.	$28.99	$24.95
1985—219 vols./49 pubs.	$16.53	$16.95	1985—137 vols./60 pubs.	$22.09	$19.50	1985—179 vols./70 pubs.	$24.25	$25.00
1984—172 vols./42 pubs.	$16.46	$15.95	1984—134 vols./60 pubs.	$21.75	$18.95	1984—149 vols./79 pubs.	$24.77	$22.50
1983—214 vols./42 pubs.	$15.27	$14.95	1983—150 vols./62 pubs.	$20.74	$18.50	1983—172 vols./51 pubs.	$21.90	$20.00
1982—177 vols./41 pubs.	$14.75	$14.95	1982—140 vols./62 pubs.	$20.43	$18.95	1982—152 vols./64 pubs.	$22.88	$19.50

*Not Mystery, Western, SF, Light Romances

**Includes memoirs and letters

***Includes pictorial history but not Art Books

1986: The Year in Review

Hardcover Bestsellers

Another year of high unit sales, but the number of winning titles is similar to 1985

BY DAISY MARYLES

While several new sales records were set by the 1986 group of hardcover bestsellers, these books did not in most cases surpass the figures achieved by the top-selling 1985 hardcovers. Once again, this year five hardcovers went over the million mark; and 12 books over the 500,000 line (compared to 13 in 1985). But in fiction, only 15 went over 200,000 units sold, down from the 19 that achieved that sales level in 1985. What did not change much was the number of fiction bestsellers with reported sales of over 100,000—42 in 1986, 43 in 1985.

The competition for placement among the nonfiction bestsellers of the year was the stiffest ever. For the first time, a 300,000-copy sale did not guarantee a spot among the top 15. But again, in the 200,000-copy range and over 100,000, the 1986 group of nonfiction leaders performed much the same as 1985 bestsellers—23 sold over 200,000 and 51 were over 100,000 in 1986; in 1985, 21 and 50 went over 200,000 and 100,000 respectively.

Even without surpassing last year's record, the sales performance of the 1986 bestsellers is impressive and far outstrips the unit sales figures of *PW* annual bestsellers of past years. A look at just the leaders on the 1986 hardcover lists demonstrates how high some books and authors have soared. In the case of Stephen King, his 1,206,266 sales by the end of the year for *It* are considerably higher than his previous hardcover sales record, achieved by *Pet Sematary*, 657,741 in 1983. A collaboration with Peter Straub, *The Talisman*, made it to *only* 880,287 in 1984. And the #1 nonfiction title, *Fatherhood* by Bill Cosby, set a record as the fastest-selling hardcover book in U.S. publishing history—its unit sales of 2.4 million as of the end of 1986 were the highest of any book on *PW*'s annual bestseller charts; the previous highest grosser was Richard Bach for *Jonathan Livingston Seagull*, which sold 1,815,000 copies during 1972. It's hard to believe that back in 1979, Robert Ludlum made it to the top of the list with sales of 250,000 (this year, his latest hit had sales of more than 657,000).

While first novels enjoyed a good run last year—four claim sales of over 100,000 copies—new novelists

PW's 1986 Hardcover Bestsellers

Fiction

1. **It** by Stephen King. Viking (Published Sept. 15, 1986); 1,206,266 copies sold in 1986
2. **Red Storm Rising** by Tom Clancy. Putnam (Aug. 7, 1986); 1,025,020

*3. **Whirlwind** by James Clavell. Morrow (Nov. 10, 1986)

4. **The Bourne Supremacy** by Robert Ludlum. Random House (Mar. 15, 1986); 657,054
5. **Hollywood Husbands** by Jackie Collins. Simon & Schuster (Oct. 15, 1986); 517,000
6. **Wanderlust** by Danielle Steel. Delcorte Press (July 25, 1986); 502,234
7. **I'll Take Manhattan** by Judith Krantz. Crown (May 15, 1986); 418,000
8. **Last of the Breed** by Louis L'Amour. Bantam (July 1, 1986); 400,000
9. **The Prince of Tides** by Pat Conroy. Houghton Mifflin (Oct. 21, 1986); 297,000
10. **A Perfect Spy** by John le Carré. Knopf (May 15, 1986); 285,600
11. **A Matter of Honor** by Jeffrey Archer. Linden Press (July 11, 1986); 278,000

*12. **Lie Down with Lions** by Ken Follett. Morrow (Jan. 31, 1986)

13. **The Eighth Commandment** by Lawrence Sanders. Putnam, (June 5, 1986); 251,745
14. **Act of Will** by Barbara Taylor Bradford. Doubleday (June 20, 1986); 205,000
15. **Cyclops** by Clive Cussler. Simon & Schuster (Jan. 30, 1986); 183,000

Nonfiction

1. **Fatherhood** by Bill Cosby. Doubleday (Published May 23, 1986); 2,400,000 copies sold in 1986
2. **Fit for Life** by Harvey and Marilyn Diamond. Warner Books (June 12, 1985); 1,350,252
3. **His Way: The Unauthorized Biography of Frank Sinatra** by Kitty Kelley. Bantam (Oct. 15, 1986); 1,005,000

*4. **The Rotation Diet** by Martin Katahn. Norton (May 6, 1986)

5. **You're Only Old Once** by Dr. Seuss. Random House (Mar. 2, 1986); 655,304

*6. **Callanetics: Ten Years Younger in Ten Hours** by Callan Pinckney. Morrow (Sept. 1984)

*7. **The Frugal Gourmet Cooks with Wine** by Jeff Smith. Morrow (Oct. 16, 1986)

8. **Be Happy—You Are Loved!** by Robert H. Schuller. Thomas Nelson (Sept. 23, 1986); 380,292
9. **Word for Word** by Andrew A. Rooney. Putnam (Nov. 16, 1986); 375,601
10. **James Herriot's Dog Stories** by James Herriot. St. Martin's (June 2, 1986); 375,000
11. **McMahon!: The Bare Truth About Chicago's Brashest Bear** by Jim McMahon with Bob Verdi. Warner Books (Nov. 1986); 360,950

*12. **The Frugal Gourmet** by Jeff Smith. Morrow (July 1984)

13. **Men Who Hate Women and the Women Who Love Them** by Dr. Susan Forward and Joan Torres. Bantam (Sept. 1986); 330,000
14. **One More Time** by Carol Burnett. Random House (Oct. 21, 1986); 329,167

*15. **Bus 9 to Paradise** by Leo Buscaglia. Morrow/Slack (Feb. 14, 1986)

NOTE: Rankings on these lists are determined by sales figures provided by publishers; the numbers reflect reports of copies "shipped and billed" only and should not be regarded as net sales figures, since publishers do not yet know what their final returns will be.

*Sales figures were submitted to *PW* in confidence, for use only in placing the titles in their correct positions on a specific list.

enjoyed an even better run in 1985, when three first efforts made it to the top 15. Fourteen of the 15 top 1986 fiction bestsellers were by people who have been on these end-of-the-year lists before—the only new name is Pat Conroy, certainly no debutant. There were almost no surprise subjects on the nonfiction list either—humour, fitness, biographies and bestselling nonfiction veterans dominated. The only new subject category among the nonfiction bestellers was sports, with one hit among the top 15 and two more among the runners-up.

All the figures for the top hardcover bestsellers, including runners-up, are based on sales figures supplied by publishers. We asked them to give us figures that reflect only 1986 U.S. trade sales—that is, sales to bookstores, wholesalers and libraries only—not book club, overseas and direct mail sales.

"Sales," as used on these lists, refers to books shipped and billed in calendar year 1986. Publishers were, however, asked to reflect returns made through January 30, 1987. Still, in many cases, the 1986 sales figures include books still on bookstore and wholesaler shelves and/or books on the way back to the publishers' warehouses, as well as books planned for return that may not yet have been counted. (How publishers view the returns situation and the role played by the mega-bestsellers was discussed at a recent *PW* Roundtable—see page 34 for a full report).

The Million Mark

There were five books that soared over the million mark in 1986 and—as noted earlier—one even went over two million. Distribution in mass market outlets, aggressive promotion and widespread discounting seem to combine in these cases to push a book to the seven-figure point.

In the case of the two fiction high rollers, their ability to sell well over the 750,000 mark was never a question. But that extra push? According to Viking sales director Brenda Marsh, King always gets maximum distribution and the advance was first set at 850,000, until customer demand brought the pre-pub in-print figure to 1,000,000. Success was helped, she said, by better-than-usual reviews for King; by the sheer size of the book (1152 pages); and by the "super-sensational marketing campaign" that capitalized on the book's catchy title. Advance order easels, posters, streamers, ceiling signs, buttons for store employees were all part of an "It" kit sent to booksellers. The point-of-purchase material carried such claims as "We're making *IT* big," "Don't leave this store without *IT*," and "*IT* is here."

Putnam's *Red Storm Rising*, with sales of 1,025,020, was Tom Clancy's second book. His first, *The Hunt for Red October*, was the first novel ever published by Naval Institute Press and its sales of over 295,000 in 1985 were enough to place it at #13 on that year's annual list. According to Putnam publisher Christine Schillig, Clancy's second book was simply "the right book with the right author at the right moment." She called *Red Storm Rising* a breakout book that reached a "huge audience of men who never before bought a book." The enormous public attention received by the author's first book and the fact that it was adopted as a favorite by Washington military and government circles (Reagan himself claimed to have read and loved it) made it possible for Clancy to tap the male fascination with military stories and high-tech weaponry.

Paul Bresnick, the Dolphin editor who came up with the idea of getting actor Bill Cosby to write a book on fathering, offers his winning formula in much the same terms: "It was the right idea at the right time with the right author." Bresnick adds one more given— "the book delivered." He points to the actor's immense popularity on the #1 TV sitcom and new sensibilities about parenting as factoring significantly into the book's success. Its publication right before Father's Day was a natural for giving the book momentum. Sales were also helped by wide distribution to outlets more traditionally reserved for paperbacks. All the 2000+ outlets of Kroeger's had 30-copy floor displays of the book ("We were the second hardcover to get this treatment, *Elvis and Me* was the first," says Bresnick) as did all K mart locations. The price point of $14.95 was a "super idea," noted Bresnick. "Since we anticipated aggressive discounting, we thought it was important that the customer get change from a $10 bill when buying *Fatherhood*." He emphasized the importance of the chains and the discounting marketplace in taking a book to the level achieved by the Cosby title. But major success was never in doubt; the book had 1,000,000 in print before publication and there was a record-breaking first serialization in *Good Housekeeping* at $45 a word.

The second nonfiction million-copy bestseller, *Fit for Life*, is a holdover from the previous year, when sales of 574,000 put it on the #4 spot for the year-end list. Its phenomenal success continued in 1986, with unit sales that reached 1,350,252 in a 12-month time span. It had a short-lived run as the fastest-selling hardcover bestseller, to be overtaken almost immediately by *Fatherhood*. But unlike the other "millionaires," *Fit for Life's* success wasn't evident from the onset. It went out with a mere 50,000-copy first printing, and despite its $50,000 ad budget, three-week author tour to 15 cities and a strong advance sale, was initially slow to get on the bestseller list. The house commitment, demonstrated by full-page ads in the *New York Times*, the enthusiasm of Merv Griffin (who lost weight on the diet regimen) and the authors' appearance on *Donahue*, sent the book over the top.

Supermarket Sales

Bantam's track record for getting a nonfiction title over the million-copy sale threshold has been well demonstrated—*His Way* with 1986 sales of 1,005,000 is its third hardcover in two years to make it into seven figures (*Iacocca* and *Yeager* were the other two). Publisher Linda Grey pointed to the single most important factor shared by all three mega-bestsellers—"Each chronicled extraordinary lives—a subject larger than life where the interest of the public transcends traditional levels and draws people to bookstores who usually don't buy books, especially hardcovers." Sinatra's attempts to bring litigation to stop author Kitty Kelley from writing her book certainly contributed to the book's pre-pub notoriety. It went out with a 525,000 first printing, the largest initial hardcover printing in Bantam's history. Exceptional sales in Southern California supermarkets and wide distribution in Duane Reade drugstores in the East were just a few of the indicators for the book's success in nontraditional outlets for hardcovers. Grey points to first serialization in *People* ("a perfect launching pad") as being instrumental in creating the "frenzy" for the book right from the start.

One book that didn't sell a million copies in 1986 but did hit that figure if you add on the sales achieved in the first month or so of 1987 was *The Rotation Diet* from Norton. The book was the bestselling hardcover in Norton's 60+ years, and it added a new dimension to the concept of selling hardcovers in the supermarket. Author Martin Katahn, director of the Vanderbilt weight management program, was looking for volunteers to test his diet theory outlined in the book. An ad in a Nashville paper got over 1200 volunteers instead of the hoped-for 25; local radio and television coverage offered to give the essentials of the diet free on the air. Soon there were almost 70,000 people on the diet. A friend of the author's, an executive in the food service business, arranged for all the area Kroeger's supermarkets to merchandise "Rotation Diet specials," with official weigh-ins, weekly diet plans and shopping lists. Nashville papers were covering the phenomenon, even reporting at one point that the city was running out of vegetables. This same kind of promotion was expanded in supermarkets across the country. There were even corporate sponsors for the book; in Tulsa, billboards from competing corporations offered a penny a pound per employee for United Way.

The Fiction Bestsellers

Six of the novelists that were among the 1985 top 15 fiction bestsellers are back again this year with more crowd pleasers, including Stephen King, Tom Clancy, Jackie Collins, Danielle Steel, Louis L'Amour and Lawrence Sanders. Robert Ludlum and Jeffrey Archer were on the 1984 end-of-the-year list; John le Carré was high up in 1983; Judith Krantz and Ken Follett made it on to the 1982 list; James Clavell led the 1981 list; and Clive Cussler and Barbara Taylor Bradford have had previous spots on the runners-up list. For Pat Conroy, this was his breakout book, but his previous books did rack up mass market sales and have been made into successful movies. Clearly, there was no room among the top spots for an author with no previous track record.

The #3 fiction bestseller, James Clavell's *Whirlwind*, enjoyed the #1 spot for five of the last seven weeks of the year and is still among the weekly bestsellers; yet, it was one of the books singled out in bookseller surveys as a "keen disappointment," perhaps a reflection of large quantities on hand despite strong sales.

Pat Conroy was the most talked-about author at last year's ABA and booksellers were eagerly anticipating selling *The Prince of Tides*, #9 on this year's list with sales of about 297,000. It made it onto *PW*'s weekly list prior to official publication date and went up as high as #5 during its 18-week tenure. It too was cited by some booksellers as disappointing; others noted that it was among the books they were most successfully handselling.

Robert Ludlum seems to go from strength to strength. An actor and theatrical producer who at 40 decided to change careers, Ludlum came out with his first book, *The Scarlatti Inheritance*, in 1971, but it took him until 1973 to crack these year-end lists with *The Matlock Paper* in the #8 spot. His newest, *The Bourne Supremacy*, is his bestselling hardcover to date. Jackie Collins, too, had her bestselling hardcover with *Hollywood Husbands*, which racked up 517,000 copies, enough for the #5 position. Back in 1983, *Hollywood Wives* landed on the #9 spot with sales of 226,505; last year, *Lucky* was #7 with sales of about 386,000.

This is the fourth year in a row that Louis L'Amour has had a hardcover bestseller among the top 15, a perfect batting average considering that *Last of the Breed* is only his fourth hardcover original. Danielle Steel, too, is a regular on these lists, at least since 1981. In 1986, she racked up enough sales of *Wanderlust* to give her the #6 position. She did better in 1985 when she had two among the top 10—*Secrets* in the #6 spot and *Family Album*, at #9.

Krantz also boasts a perfect bestselling record. Each of her four books has made it onto these annual lists; her latest, *I'll Take Manhattan*, selling the best with about 400,000 copies, giving her the #4 slot. Five of John le Carré's appearances on these charts were in the #4 position, the last for *The Little Drummer Girl* with sales of over 400,000 copies in 1983. His sales have slipped a bit, as *A Perfect Spy* reached #10 based on sales of 285,600. On the other hand, Jeffrey Archer went up a few notches with sales of 278,000 for *A Matter of Honor*, in the #11 spot, compared with his last bestseller appearance, *First Among Equals*, #14 in 1984 with sales of 226,000. *The Eighth Commandment*, #13 on this year's list, is Lawrence Sanders's 21st novel. His first novel, *The Anderson Tapes*, was published in 1970 and his publisher estimates that his books have sold in excess of 25 million copies and are published in 15 languages.

The Fiction Runners-Up

The second tier of fiction bestsellers includes several first novels—even one by President Reagan's daughter—as well as bestseller veterans and a number of science fiction books; among them four of the first five volumes of the Mission Earth series by L. Ron Hubbard.

> 'The competition for placement among the nonfiction bestsellers of the year was the stiffest ever. For the first time, a 300,000-copy sale did not guarantee a spot among the top 15'

16. *Seasons of the Heart* by Cynthia Freeman (Putnam, 3/86; *175,798* sold in 1986)

17. *Lake Wobegon Days* by Garrison Keillor (Viking, 9/85; *175,248*)

18. *Foundation and Earth* by Isaac Asimov (Doubleday, 10/86; *170,000*)

19. *Through a Glass Darkly* by Karleen Koen (Random, 9/86; *165,244*)

20. *A Taste for Death* by P. D. James (Knopf 11/86); *162,869*)

21. *The Golden Cup* by Belva Plain (Delacorte, 10/86; *160,239*)

22. *Flight of the Intruder* by Stephen Coonts (Naval Institute Press, 9/86; *156,824*)

23. *Mordant's Need: The Mirror of Her Dreams* by Stephen R. Donaldson (Del Rey Hardcover, 11/86; *140,000*)

24. *Garden of Eden* by Ernest Hemingway (Scribners, 5/86; *137,662*)

25. *The Songs of Distant Earth* by Arthur C. Clarke (Del Rey Hardcover, 5/86; *135,000*)

26. *Regrets Only* by Sally Quinn (Simon & Schuster, 8/86; *131,000*)

27. *Suspects* by William Caunitz (Crown, 8/86; *121,000*)

28. *Homefront* by Patti Davis (Crown, 3/86; *118,000*)

29. *Break In* by Dick Francis (Putnam, 3/86; *115,655*)

30. *Fortune of Fear, Volume 5* by L. Ron Hubbard (Bridge Publications; 10/86; *111,638*)

Last year there were 12 fiction titles with sales over 100,000 that didn't make our top 30 list. This year there were only six such titles. They are: *Magic Kingdom for Sale—Sold!* by Terry Brooks (Del Rey Hardcover); *The Good Mother* by Sue Miller (Harper & Row); *Nobody Lives Forever* by John Gardner (Putnam); and three other titles by L. Ron Hubbard all published by Bridge—*An Alien Affair, Volume 4, The Enemy Within, Volume 3* and *Black Genesis: Fortress of Evil, Volume 2.*

Nonfiction Leaders

One title *PW* had expected to see place among the nonfiction books that sold in the six figures was David Stockman's *The Triumph of Politics: Why the Regan Revolution Failed*, especially because of its pre-publication printing of 360,000 copies and a 10-week run on *PW*'s bestseller list. Harper & Row, which paid about $2.4 million for the book, declined to share any figures on it, stating this was company policy for this title. The question of how much of its price tag the book has earned out will continue to be the subject of much conjecture.

Seasoned authors were also a common characteristic of the nonfiction top 15, with such names as Dr. Seuss, Jeff Smith, Robert Schuller, Andy

Rooney, James Herriot and Leo Buscaglia. Entertainment figures like Frank Sinatra, Bill Cosby and Carol Burnett were author and/or subjects of three other top sellers. And football's bad boy Jim McMahon made it to the list with what may be one of the first football biographies to achieve that goal.

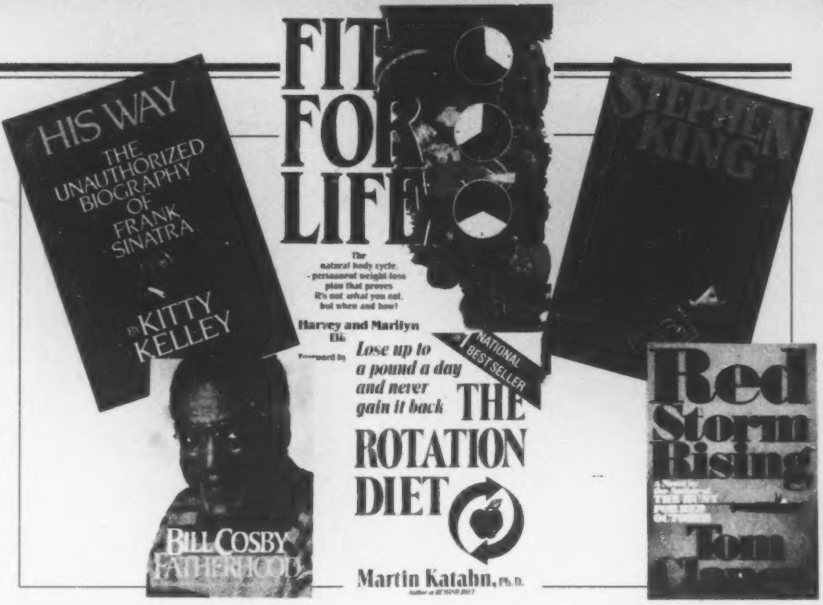
Men Who Hate Women & the Women Who Love Them, Bantam's self-help guide "for men and women caught up in misogynistic relationships" by psychologist Dr. Susan Forward is the only nonfiction top seller not by or about a well-known name. However, Forward, in the #13 spot, is a recognized name in her field and has a two-hour daily ABC radio program.

Jeff Smith, star of the very successful national public television series *The Frugal Gourmet*, had an excellent run in print in 1986, with two books among the top 15, *The Frugal Gourmet Cooks with Wine*, at #7 and *The Frugal Gourmet*, #12. The latter was #8 on last year's list of top nonfiction movers. Morrow's third title among the top 15 was one of the 1985 bestsellers that sold more than 100,000 copies that year.

Theodor Seuss Geisel, better known to his younger fans as Dr. Seuss, wrote his first book specifically for adults, *You're Only Old Once*. Sales went over the 655,000 mark, enough to land it on the #5 spot, the same position captured in 1984 for his children's title, *The Butter Battle Book*, which had 423,405 sales that year.

Andrew Rooney once again scored, with *Word for Word*. In 1984, he made the #4 spot for *Pieces of My Mind*, which garnered sales that year of 425,000; two years prior he had two books on the year-end list: *And More by Andy Rooney* at #3 with sales of more than 510,000 and *A Few Minutes with Andy Rooney*, #7 with sales that year of about 306,000. Veterinarian James Herriot had two winners last year, *James Herriot's Dog Stories* at #10 and *The Christmas Day Kitten*, #17. His first appearance on these lists was back in 1972 with *All Things Bright and Beautiful*, #8 with sales of 187,563.

"Televangelist" Robert Schuller makes a fourth appearance in four years on these lists; he had the #5 spot in 1985 for *The Be-Happy Attitudes*, with sales of 525,000. Leo Buscaglia's philosophy of "caring and sharing" continues to be popular and his latest book, *Bus 9 to Paradise*, rounds out the nonfiction top 15—the same spot he achieved last year with *Loving Each Other*.



HIS WAY
THE UNAUTHORIZED BIOGRAPHY OF FRANK SINATRA
KITTY KELLEY
FIT FOR LIFE
The natural body cycle, permanent weight-loss plan that proves it's not what you eat, but when and how!
Harvey and Marilyn Diamond
STEPHEN KING
NATIONAL #1 BEST SELLER
Lose up to a pound a day and never gain it back
THE ROTATION DIET
Martin Katahn, Ph.D.
BILL COSBY FATHERHOOD
Red Storm Rising
Tom Clancy

The Nonfiction Runners-Up

Many books on the list below would have earned a spot among the top 15 in previous years, considering that in 1985 the #15 nonfiction bestseller had sales of just over 219,000; about 215,000 was enough in 1984; and 185,000 in 1983. The books below, too, include many familiar names and themes; however, politics and business titles seem to have fared less well than in previous years.

16. *A Day in the Life of America* by Rick Smolan and David Cohen, project directors (Collins, 10/86; *300,000* copies sold in 1986)

17. *The Christmas Day Kitten* by James Herriot (St. Martin's, 10/86; *260,000*)

18. *Rock Hudson* by Sara Davidson (Morrow, 7/86)

19. *One Knee Equals Two Feet (and Everything Else You Need to Know About Football)* by John Madden with Dave Anderson (Villard, 9/86; *230,368*)

20. *When All You've Ever Wanted Isn't Enough: The Search for a Life that Matters* by Harold Kushner (Summit Books, 4/86; *212,000*)

21. *The Rice Diet Report* by Judy Moscovitz (Putnam, 3/86; *209,083*)

22. *The Reckoning* by David Halberstam (Morrow, 10/86; *208,385*)

23. *Dreamgirl: My Life as a Supreme* by Mary Wilson (St. Martin's, 10/86; *205,000*)

24. *Weight Watchers Favorite Recipes* (NAL Books, 12/86; *199,386*)

25. *Pat Nixon: The Untold Story* by Julie Nixon Eisenhower (Simon & Schuster, 11/86; *188,000*)

26. *Jane Fonda's New Workout & Weight-Loss Program* by Jane Fonda (Simon & Schuster, 7/86; *163,000*)

27. *Necessary Losses* by Judith Viorst (Simon & Schuster, 4/86; *158,000*)

28. *And So It Goes* by Linda Ellerbee (Putnam, 5/86; *155,053*)

29. *Snake: The Candid Autobiography of Football's Most Dangerous Renegade* by Ken Stabler and Berry Stainback (Doubleday, 9/86; *150,000*)

30. *My Daddy Was Pistol and I'm a Son of a Gun* by Lewis Grizzard (Villard, 10/86; *145,951*)

There were also 21 more nonfiction titles that sold over 100,000 copies in 1986 without making the top 30 list, two more than the 19 books that fared the same way in 1985. They include: *The Story of English* by Robert McCrum, William Cran And Robert MacNeil (Elisabeth Sifton Books/Viking); *Ford: The Men and the Machine* by Robert Lacey (Little, Brown); *Unlimited Power* by Anthony Robbins (Simon & Schuster); *Yeager: An Autobiography* by General Chuck Yeager and Leo Janos (Bantam); *New Good Housekeeping Cookbook* by the editors of *Good Housekeeping* (Morrow); *Dancing On My Grave* by Gelsey Kirkland with Greg Lawrence (Doubleday); *Enter Talking* by Joan Rivers with Richard Meryman (Delacorte Press); *Across China* by Peter Jenkins (Morrow); *Mayflower Madam: The Secret Life of Sydney Biddle Barrows* by Sydney Biddle Barrows with William Novak (Arbor House); *I, Tina* by Tina Turner (Morrow); *America's Date with Destiny* by Pat Robertson (Nelson); *Iacocca: An Autobiography* by Lee Iacocca with William Novak (Bantam); *Paul Prudhomme's Louisiana Kitchen* by Paul Prudhomme (Morrow); *Medical Makeover* by Robert Giller (Morrow); *Wiseguy: Life in a Mafia Family* by Nicholas Pileggi (Simon & Schuster); *The Great Getty* by Robert Lenzer (Crown); *The Search for Signs of Intelligent Life in the Universe* by Jane Wagner (Harper & Row); *No Laughing Matter* by Joesph Heller and Speed Vogel (Putnam); *Made In Japan: Akio Morita and Sony* by Akio Morita with Edwin M. Reingold and Mitsuko Shimomura (E. P. Dutton); *Marilyn* with text by Gloria Steinem and photographs by George Barris (Henry Holt and Co); and *LIFE: The First Fifty Years* by the editors of *Life* (Little, Brown). ☐

1986: The Year in Review

Paperback Top Sellers

A dip in trade paperbacks; mass market titles level off

BY JOHN MUTTER

The number of bestselling trade paperbacks dipped in 1986 from 1985, as recorded in *Publishers Weekly*'s annual trade paperback top sellers list, compiled each year since 1977 and based on sales of 50,000 copies or more. The titles include annuals, atlases and almanacs, and to be included the books must have been published during 1986 or 1985, although sales figures are given for 1986 only.

In 1986 there were 184 trade paperback bestsellers, down from 194 titles in 1985 and also slightly down from 187 titles the year before that. The all-time high of 208 titles was achieved in 1983.

American trade paperback customers seemed to want a good laugh in 1986. Of the six trade paperback titles selling 500,000 copies and more, four were cartoon or humor books. The other two trade paperbacks with sales over 500,000 were a movie tie-in edition of *Out of Africa* by Isak Dinesen and Leo Buscaglia's *Loving Each Other*, a reprint. Previous bestselling categories, such as business, romance and horror, had no representatives in the top tier.

Berke Breathed, the "Bloom County" syndicated newspaper cartoonist who on average puts out one new collection a year, topped the list with *Bloom County Babylon*, published in 1986, which sold almost 677,000 copies. Breathed's *Penguin Dreams and Stranger Things*, which sold 534,000 copies during 1985, sold an additional 140,000 copies in 1986.

Two Gary Larson humor books, *The Far Side Gallery 2* and *It Came from the Far Side*, had sales of 608,000 and 586,000 respectively, and two other Larson titles, *The Bride of the Far Side* and *Valley of the Far Side*, also had strong sales. Altogether there were nearly 1.8 million Larson books sold last year, compared to 1.3 million in 1985.

Jim Davis's fat cat Garfield seemed to take a nap at the bookstore counters last year, although still performing well enough. *Garfield Out to Lunch* sold 535,000 copies. *Garfield in Paradise*, a TV tie-in, sold some 310,000 copies and *The Garfield Trivia Book*, written by Davis with Bill Tornquist, sold 225,000 copies. All in all, Garfield books on the bestseller list sold slightly over 1.5 million copies, down from 1.9 million in 1985 and 2.5 million in 1984.

Science fiction and fantasy trade paperback books did well in 1986, led by the three volumes, all originals, of Margaret Weis and Tracy Hickman's Dragonlance Legends trilogy, which between them sold a total of over 1.1 million copies.

Cookbook publishers seemed to have found a recipe for new, improved sales in 1986, as two titles, a new edition of *Betty Crocker's Cookbook* and the *Weight Watchers Quick Start Plus Cookbook*, enjoyed sales of 360,000 and 275,000 respectively. Two other strong cookbook titles had unusual themes that apparently struck many chefs' fancies: *The Firefighter's Cookbook* by John Sineno sold 190,000 copies and *White Trash Cooking* by Ernest Matthew Mickler had sales of 161,000.

Rich Hall, who originated the concept of "sniglets"—words coined by the cast and viewers of cable TV's *Not Necessarily the News*—did well with the third sniglet book in three years, *Unexplained Sniglets of the Universe*, which sold 263,000 copies. His previous sniglet titles sold in the same range.

Other titles that sold over 100,000 copies included a business book, *Passion for Excellence*, a reprint by Tom Peters and Nancy Austin (Peters was coauthor of *In Search of Excellence*), and a tax guide, *Pay Less Tax Legally* by Barry Steiner, an original.

Bestselling humor books that sold fewer than 100,000 copies included several "Catholic" titles, *Growing Up Catholic* and its successor, *More Growing Up Catholic*, by Maureen Kelly, Richard Davis, Jeff Stone and Jane Meara, as well as *Catholics* by Rick Detorie.

Several 1986 bestsellers were parodies of magazines. *Dogue* by Ilene Hochberg was a takeoff on *Vogue*, and *Snooze* by John Buskin and Alfred Gingold was a parody of the *New Yorker*.

The two bestselling trade paperback romances last year were Bertrice Small's *A Love for All Time* (185,000 copies) and Jennifer Blake's *Prisoner of Desire* (150,000), both originals. In previous years, trade paperback romance titles did much better. In fact, the #1 book on the trade paperback list last year was *Come Love a Stranger* by Kathleen E. Woodiwiss, an original that sold 1.4 million copies.

Among the literary titles on the list were *Less Than Zero* by Bret Easton Ellis, a reprint that sold 160,000 copies; *Native Son* by Richard Wright, a movie tie-in (120,000 copies); *Cold Sassy Tree* by Olive Ann Burns (120,000); *A Room With a View* by E. M. Forster, another movie tie-in (95,000); and *The Lover* by Marguerite Duras (84,000).

Mass Market Steady in 1986

A total of 103 mass market titles published in 1985 or 1986 had in-print figures at the end of 1986 of at least one million copies and thus qualified for *PW*'s 1986 mass market bestseller list—one less than appeared on the 1985 list. This leveling off was the first in four years. After setting an all-time high in 1980 with 113 bestselling mass market titles, the number of titles on the list dropped in 1981 and 1982; since then, the numbers had steadily increased until this year.

This year nine titles had three million copies or more in print compared to four titles last year. Six of the nine titles were published in 1985 but had some sales in 1986. Another 16 titles (just five of which were published in 1985) had in-print figures of two million copies or more, compared to 18 the previous year (of those 18, eight were published in 1984).

Sidney Sheldon's *If Tomorrow Comes*, a crime-thriller reprint, led the list with over four million copies in print. *Iacocca: An Autobiography* by Lee Iacocca with William Novak proved to be as popular in paperback as hardcover and had an in-print figure at the end of 1986 of over 3.8 million copies.

Danielle Steel returned yet again to the top ranks of the mass market bestsellers. *Family Album*, a 1986 reprint, had 3.1 million copies in print, and *Full Circle*, a 1985 reprint, had three million copies in print. *Secrets*, another 1986 reprint, had 2.7 million copies in print.

There was only one mass market media tie-in that had an in-print figure of over one million last year: Jean Auel's *The Clan of the Cave Bear*.

Trade Paperbacks

Titles listed here are trade paperbacks (originals, reprints, reissues or books issued in dual editions) published in 1985 or 1986 of which publishers have billed and shipped at least 50,000 copies to bookstores in 1986. Please note that publishers' sales figures are not necessarily the final net sales for the book, since they do not always reflect returns. Those titles that were released in 1985 are marked with an asterisk. Almanacs, atlases and annuals are listed on page 28.

500,000+
__Bloom County Babylon.__ Berke Breathed. Dual. Little, Brown (676,578)
*__Out of Africa.__ Isak Dinesen. Reprint. Vintage (653,793)
__The Far Side Gallery 2.__ Gary Larson. Original. Andrews, McMeel & Parker (608,000)
__It Came from the Far Side.__ Gary Larson. Original. Andrews, McMeel & Parker (586,000)
__Loving Each Other.__ Leo Buscaglia. Reprint. Fawcett/Columbine (553,000)
__Garfield Out to Lunch.__ Jim Davis. Original. Ballantine (535,000)

200,000+
__Dragonlance Legends, Vol. II, War of the Twins.__ Margaret Weis and Tracy Hickman. Original. TSR (391,000)
__Dragonlance Legends, Vol. I, Time of the Twins.__ Margaret Weis and Tracy Hickman. Original. TSR (364,000)
__Betty Crocker's Cookbook, 6th Edition.__ Original. Western Publishing (360,000)
__Dragonlance Legends, Vol. III, Test of the Twins.__ Margaret Weis and Tracy Hickman. Original. TSR (354,000)
__Unabridged, Uncensored, Unbelievable Garfield.__ Jim Davis. Original. Ballantine (350,000)
__Garfield in Paradise.__ Jim Davis. Original. Ballantine (310,000)
*__Valley of the Far Side.__ Gary Larson. Original. Andrews, McMeel & Parker (276,000)
__Weight Watchers Quick Start Plus Cookbook.__ Weight Watchers International. Reprint. NAL/Plume (275,427)
__Pay Less Tax Legally.__ Barry Steiner. Original. NAL/Signet Special (271,266)
__Unexplained Sniglets of the Universe.__ Rich Hall. Original. Collier/Macmillan (263,138)
*__Bride of the Far Side.__ Gary Larson. Original. Andrews, McMeel & Parker (228,000)
__The Garfield Trivia Book.__ Jim Davis with Bill Tornquist. Original. Ballantine (225,000)
__Passion for Excellence.__ Tom Peters and Nancy Austin. Reprint. Warner (216,196)

100,000+
__The Firefighter's Cookbook.__ John Sineno. Original. Vintage (190,675)
__More Growing Up Catholic.__ Maureen Kelly, Richard Davis, Jeff Stone, Jane Meara. Original. Dolphin/Doub-leday (190,000)
__A Love for All Time.__ Bertrice Small. Original. NAL/Signet Special (184,564)
__White Trash Cooking.__ Ernest Matthew Mickler. Reprint. Ten Speed Press (161,000)
__Less Than Zero.__ Bret Easton Ellis. Reprint. Penguin (160,000)
__Prisoner of Desire.__ Jennifer Blake. Original. Fawcett/Columbine (150,000)
__Grayhawk Adventures, Vol. II, Artifact of Evil.__ Gary Gygax. TSR (150,000)
__Max Headroom: 20 Minutes Into the Future.__ Steve Roberts. Original. Vintage (148,703)
*__Struggle for Intimacy.__ Janet Geringer Woititz. Original. Health Communications (147,622)
__Miami Vice Scrapbook.__ Sharon Publications. Original. NAL/Signet Special (143,643)
__Microwave Cookbook—The Complete Guide.__ Pat Jester. Dual. HP Books (141,103)
*__Silver Palate Good Times.__ Julee Rosso, Sheila Lukins and Sarah Lea Chase. Original. Workman (141,000)
*__Growing Up Catholic.__ Maureen Kelly, Richard Davis, Jeff Stone, Jane Meara. Original. Dolphin/Doubleday (140,000)
*__Penguin Dreams and Stranger Things.__ Berke Breathed. Original. Little, Brown (139,298)
__The Yeast Connection.__ William G. Crook, M.D. Reprint. Vintage (136,101)
__Herman Treasury 5.__ Jim Unger. Original. Andrews, McMeel & Parker (133,000)
__*Dogue*: A Parody of the World's Most Famous Fashion Magazine.__ Ilene Hochberg. Original. Main Street Press (128,710)
__Fresh Ways with Chicken.__ Editors of Sunset Books. Original. Sunset Books (127,145)
__Weight Watchers Fast and Fabulous Cookbook.__ Weight Watchers International. Reprint. NAL/Plume (126,195)
__Wee Sing Bible Songs.__ Pam Beal and Susan Nipp. Original. Price/Stern/Sloan (125,342)
__The Complete Guide to Prescription & Nonprescription Drugs, Revised Edition.__ H. Winter Griffith, M.D. Original. HP Books (122,417)
__Native Son.__ Richard Wright. Reissue. Harper & Row/Perennial Library (120,687)
__Women Coming of Age.__ Jane Fonda. Reprint. Fireside/Simon & Schuster (120,000)
__Cold Sassy Tree.__ Olive Ann Burns. Original. Dell (120,000)
__The Bow-Tie Book.__ Mario Sartori. Original. Fireside/Simon & Schuster (120,000)
*__People of the Lie.__ M. Scott Peck, M.D. Reprint. Touchstone/Simon & Schuster (117,000)
__Transformers #4: Earthquake!__ Ann Matthews. Original. Ballantine (115,000)
__Transformers #5: Desert Flight.__ Ann Matthews. Original. Ballantine (115,000)
__Transformers #6: Deception Poison.__ Ann Matthews. Original. Ballantine (115,000)
__The Living Heart Diet.__ Michael E. DeBakey. Reprint. Fireside/Simon & Schuster (113,000)
__Creating Wealth.__ Robert G. Allen. Reprint. Fireside/Simon & Schuster (110,000)
*__More Sniglets.__ Rich Hall. Original. Collier/Macmillan (106,094)
__More Fun With Dick and Jane.__ Marc Gallant. Original. Penguin (105,000)
__Riders.__ Jilly Cooper. Original. Ballantine (105,000)
__10,000 Baby Names.__ Bruce Lansky. Original. Meadowbrook (101,300)
__Labyrinth.__ A. H. C. Smith. Original. Holt (100,000)

75,000+
__Light Cuisine.__ Editors of Sunset Books. Original. Sunset Books (96,639)
__A Room with a View.__ E. M. Forster. Reprint. Vintage (95,317)
__Habits of the Heart.__ Robert Bellah, Richard Madsen, William M. Sullivan, Ann Swidler and Steven M. Tipton. Reprint. Harper & Row/Perennial Library (94,461)
*__Daily Affirmations.__ Janet Geringer Woititz. Original. Health Communications (93,630)
__Cajun-Creole Cooking.__ Terry

Thompson. Original. HP Books (92,978)

The Human Animal. Phil Donahue. Reprint. Fireside/Simon & Schuster (90,000)

A Paler Shade of White. Martin Mull and Allen Rucker. Original. Perigee/Putnam (90,000)

Paradise Postponed. John Mortimer. Reprint. Penguin (90,000)

How to Live Longer and Feel Better. Dr. Linus Pauling. Original. W. H. Freeman and Co. (87,900)

The Pentagon Catalog. Henry Beard and Christopher Cerf. Original. Workman (86,000)

The Lover. Marguerite Duras. Reprint. Harper & Row/Perennial Library (84,440)

***Reps!** Robert Kennedy. Original. Sterling (84,000)

10 SAT's. The College Board. Original. The College Board (83,287)

Arco's Post Office Clerk-Carrier. E. P. Steinberg. Original. Arco/Prentice Hall Press (83,000)

Baseball Hall of Shame II. Bruce Nash and Allan Zullo. Original. Pocket Books (82,900)

L. Ron Hubbard Presents Writers of the Future II. Edited by Algis Budrys. Original. Bridge Publications (82,415)

***Garfield Rolls On.** Jim Davis. Original. Ballantine (82,000)

Cosby Show Scrapbook. Sharon Publications. Original. NAL/Signet Special (81,079)

***Better Homes and Gardens Anytime Appetizers.** Editors of Better Homes and Gardens Books. Original (80,914)

***Read-Aloud Handbook, Revised Edition.** Jim Trelease. Reprint. Penguin (80,000)

***Mists of Avalon.** Marion Zimmer Bradley. Reprint. Ballantine/Del Rey (80,000)

***All About Lawns.** Editors of Ortho Information Services. Original. Ortho (80,000)

***Azaleas, Camellias and Rhododendrons.** Editors of Ortho Information Services. Original. Ortho (80,000)

***Better Homes and Gardens One-Dish Microwave Meals.** Editors of Better Homes and Gardens Books. Original (79,743)

Blue Bayou. Parris Afton Bonds. Original. Fawcett/Columbine (78,000)

The Man Who Mistook His Wife for a Hat. Oliver Sacks. Reprint. Harper & Row/Perennial Library (77,654)

The Classic Tale of the Velveteen Rabbit/Color Booking. Michael Green. Original. Running Press (76,400)

***New Our Bodies, Ourselves.** Boston Women's Health Collective. Original. Touchstone/Simon & Schuster (75,000)

White Noise. Don DeLillo. Reprint. Penguin (75,000)

Arco's Practice for the Armed Forces. E. P. Steinberg. Original. Arco/Prentice Hall Press (75,000)

50,000+

Dinosaur World. Jeffrey Williams. Original. Price/Stern/Sloan (74,000)

Passages Journal. Original. Running Press (72,300)

Wild Nights. Natasha Peters. Original. Fawcett/Columbine (71,000)

What's Bred in the Bone. Robertson Davies. Reprint. Penguin (70,000)

You *Can* Fool All of the People All the Time. Art Buchwald. Reprint. Fawcett/Columbine (70,000)

Pat the Yuppie. Jim Becker and Andy Mayer. Original. Perigee/Putnam (70,000)

***Garfield in Disguise.** Jim Davis. Original. Ballantine (70,000)

The Mom Book. Deanne Stillman, Anne Beatts and Judith Jacklin. Original. Dell (69,000)

Nice Guys Sleep Alone. Bruce Feirstein. Original. Dell (68,000)

Don't Let the Turkeys Get You Down. Sandra Boynton. Original. Workman (68,000)

The Essential Whole Earth Catalog. Edited by the Point Foundation. Original. Doubleday (66,000)

A Kick in the Seat of the Pants. Roger Von Oech. Original. Harper & Row/Perennial Library (65,546)

Hard Bodies. Gladys Portugues and Joyce Vedral. Original. Dell (65,000)

Grilling & Barbecuing. John Carroll and Charlotte Walker. Original. HP Books (64,953)

Inside the IBM PC. Peter Norton. Original. Brady/Prentice Hall Press (64,600)

The Grasshopper Trap. Patrick F. McManus. Reprint. Holt (63,000)

***Part of My Soul Went with Him.** Winnie Mandela. Original. Norton (62,500)

Contract for Life. Robert Anastas. Original. Pocket Books (61,800)

Foxfire 9. Edited by Eliot Wigginton. Dual. Anchor/Doubleday (61,000)

Superpump! Ben Weider and Robert Kennedy. Original. Sterling (61,000)

***Better Homes and Gardens Kids' Lunches.** Editors of Better Homes and Gardens Books. Original (60,825)

Good Cook's Handbook. Editors of Sunset Books. Original. Sunset Books (60,506)

***Joy of Cooking.** Irma S. Rombauer and Marion R. Becker. Reprint. NAL/Plume (60,253)

American Heart Association Cookbook. American Heart Association. Reissue. Ballantine (60,000)

Love Always. Ann Beattie. Reprint. Vintage (59,480)

Baby & Child A to Z Medical Handbook. Dr. Miriam Stoppard. Original. Body Press/HP Books (59,425)

The Wine Notebook. Original. Running Press (59,100)

Work Is Hell. Matt Groening. Original. Pantheon (59,000)

Snooze. John Buskin and Alfred Gingold. Original. Workman (59,000)

Arco's Preparation for the SAT, Sixth Edition. Edited by Edward J. Deptula. Original. Arco/Prentice Hall Press (58,000)

Leaders. Warren Bennis and Burt Nanus. Reprint. Harper & Row/Perennial Library (57,315)

Long Knife. James Alexander Thom. Reprint. Ballantine (57,000)

Zen & the Art of the Macintosh. Michael Green. Original. Running Press (56,000)

***Exploring the Road Less Traveled.** Alice and Walden Howard. Original. Touchstone/Simon & Schuster (56,000)

Information U.S.A., Revised Ed. Matthew Lesko. Reprint. Penguin (55,000)

***Wishsong of Shannara.** Terry Brooks. Original. Ballantine/Del Rey (55,000)

Common Ground. J. Anthony Lukas. Reprint. Vintage (54,900)

***Better Homes and Gardens New Baby Book.** Editors of Better Homes and Gardens. Original (54,669)

The Soong Dynasty. Sterling Seagrave. Reprint. Harper & Row/Perennial Library (54,493)

Dear America. Edited by Bernard Edelman. Reprint. Pocket Books (54,200)

Keep the Home Fries Burning. Lynn Johnston. Original. Andrews, McMeel & Parker (54,000)

To Face the Sun. Frances Patton Statham. Original. Fawcett/Columbine (54,000)

Football Hall of Shame. Bruce Nash and Alan Zullo. Original. Pocket Books (53,900)

Mapp & Lucia. E. F. Benson. Reissue. Harper & Row/Perennial Library (53,883)

***Cookies.** Editors of Sunset Books. Original. Sunset Books (53,144)

Thin Thighs in Thirty Years. Cathy Guisewite. Original. Andrews, McMeel & Parker (53,000)

Tuck Everlasting. Natalie Babbit. Reissue. Farrar, Straus & Giroux (52,600)

***The Unbearable Lightness of Being.** Milan Kundera. Reprint. Harper & Row/Perennial Library (52,587)

An Artist's Notebook. Original. Running Press (52,500)

Love Is Hell. Matt Groening. Original. Pantheon (52,000)

***Pumping Up!** Ben Weider and Robert Kennedy. Original. Sterling (52,000)

***Love, Dad.** Pat Connolly. Original. Andrews, McMeel & Parker (52,000)

The Old Gringo. Carlos Fuentes. Re-

print. Harper & Row/Perennial Library (51,146)
***Better Homes and Gardens Kids' Party Cook Book.** Editors of Better Homes and Gardens Books. Original (51,018)
***Making Birdhouses and Feeders.** Charles R. Self. Original. Sterling (51,000)
A Poet's Journal. Original. Running Press (51,000)
Transformers #7: Autobot Alert. Judith Bauer Stamper. Original. Ballantine (51,000)
Transformers #8: Project Brain Drain. Judith Bauer Stamper. Original. Ballantine (51,000)
Transformers #9: The Invisibility Factor. Judith Bauer Stamper. Original. Ballantine (51,000)
Berlitz French for Travellers, Revised Edition. Berlitz. Original. Berlitz/Macmillan (50,918)
***The Bachman Books.** Richard Bachman aka Stephen King. Reprint. NAL/Plume (50,412)
Children of Alcoholism. Judith S. Seixas and Geraldine Youcha. Reprint. Harper & Row/Perennial Library (50,056)
That's *Doctor* Sinatra, You Little Bimbo. Gary Trudeau. Original. Holt (50,000)
Notes on How to Live in the World and Still Be Happy. Hugh Prather. Original. Doubleday (50,000)
***All About Bulbs.** Editors of Ortho Information Services. Original. Ortho (50,000)
***Deck Plans.** Editors of Ortho Information Services. Original. Ortho (50,000)
Catholics. Rick Detorie. Original. Perigee/Putnam (50,000)
Dear George. George Burns. Reprint. Perigee/Putnam (50,000)
The Hour Magazine Cookbook. Gary Collins. Reprint. Perigee/Putnam (50,000)
Bride's Shortcuts and Strategies for a Beautiful Wedding. The Editors of *Bride's*. Original. Perigee/Putnam (50,000)
Pillar of the Sky. Cecelia Holland. Reprint. Ballantine (50,000)

Mass Market Media Tie-ins

Below is listed the one title reissued in 1986 as a media tie-in for which the publisher reported an in-print figure of at least one million.

The Clan of the Cave Bear. Jean Auel. Bantam (4,945,000)

Mass Market Paperbacks

The following is a listing of those mass market titles published in 1985 or 1986 whose 1986 in-print figures exceed one million copies. Figures represent publishers' claims of copies in print and, as such, do not necessarily indicate how well the books actually sold. Books issued or reissued as mass market movie or TV tie-ins are listed on this page.

Note: Titles marked with an asterisk were issued in 1985; the numbers that follow these titles reflect the number of copies in print at the end of 1986, even though in most cases the bulk of these books' sales were in 1985.

3 MILLION+
If Tomorrow Comes. Sidney Sheldon. Reprint. Warner (4,058,000)
Iacocca: An Autobiography. Lee Iacocca with William Novak. Reprint. Bantam (3,815,000)
***Full Circle.** Danielle Steel. Reprint. Dell (3,220,000)
Family Album. Danielle Steel. Reprint. Dell (3,139,000)
***Thinner.** Richard Bachman aka Stephen King. Reprint. NAL (3,136,000)
***The Hunt for Red October.** Tom Clancy. Reprint. Berkley (3,058,000)
***Heaven.** V. C. Andrews. Original. Pocket Books (3,046,000)
***The Color Purple.** Alice Walker. Reprint. Pocket Books (3,016,000)

2 MILLION+
The Mammoth Hunters. Jean Auel. Reprint. Bantam (2,970,000)
Skeleton Crew. Stephen King. Reprint. NAL (2,834,000)
Secrets. Danielle Steel. Reprint. Dell (2,733,000)
***The Talisman.** Stephen King and Peter Straub. Reprint. Berkley (2,690,000)
Dark Angel. V. C. Andrews. Original. Pocket Books (2,608,000)
Lake Wobegon Days. Garrison Keillor. Reprint. Penguin (2,600,000)
***Love and War.** John Jakes. Reprint. Dell (2,569,000)
Lucky. Jackie Collins. Reprint. Pocket Books (2,505,000)
Jubal Sackett. Louis L'Amour. Reprint. Bantam (2,405,000)
***. . . And Ladies of the Club.** Helen Hooven Santmyer. Reprint. Berkley (2,277,000)
***The Sicilian.** Mario Puzo. Reprint. Bantam (2,200,000)
Elvis and Me. Priscilla Presley. Reprint. Berkley (2,110,000)
Lie Down with Lions. Ken Follett. Reprint. NAL (2,110,000)
***Descent from Xanadu.** Harold Robbins. Reprint. Pocket Books (2,081,000)
***Eat to Win.** Dr. Robert Haas. Reprint. NAL (2,052,000)
The Two Mrs. Grenvilles. Dominick Dunne. Reprint. Bantam (2,040,000)
The Bachman Books. Richard Bachman aka Stephen King. Reprint. NAL (2,000,000)

1.5 MILLION+
The Fourth Deadly Sin. Lawrence Sanders. Reprint. Berkley (1,985,000)
***The Passion of Molly T.** Lawrence Sanders. Reprint. Berkley (1,977,000)
Hold the Dream. Barbara Taylor Bradford. Reprint. Bantam (1,970,000)
***Smart Women.** Judy Blume. Reprint. Pocket Books (1,915,000)
Strong Medicine. Arthur Hailey. Reprint. Dell (1,836,500)
***Almost Paradise.** Susan Isaacs. Reprint. Ballantine (1,800,000)
***Past Imperfect.** Joan Collins. Reprint. Berkley (1,780,000)
Stillwatch. Mary Higgins Clark. Reprint. Dell (1,748,900)
The Cider House Rules. John Irving. Reprint. Bantam (1,700,000)
Yeager: An Autobiography. Chuck Yeager and Leo Janos. Reprint. Bantam (1,695,000)
***Crescent City.** Belva Plain. Reprint. Dell (1,680,000)
***First Among Equals.** Jeffrey Archer. Reprint. Pocket Books (1,655,000)
Women Who Love Too Much. Robin Norwood. Reprint. Pocket Books (1,633,000)
***Lord of the Dance.** Andrew M. Greeley. Reprint. Warner (1,622,000)
The Class. Erich Segal. Reprint. Bantam (1,605,000)
***Wheel of Fortune.** Susan Howatch. Reprint. Fawcett Crest (1,600,000)
Dancing in the Light. Shirley MacLaine. Reprint. Bantam (1,555,000)
The Secrets of Harry Bright. Joseph Wambaugh. Reprint. Bantam (1,550,000)
Lonesome Dove. Larry McMurtry. Reprint. Pocket Books (1,542,000)
Illusions of Love. Cynthia Freeman. Reprint. Berkley (1,518,000)

1 MILLION+
Virgin and Martyr. Andrew M. Greeley. Reprint. Warner (1,468,000)
***Possessions.** Judith Michael. Reprint. Pocket Books (1,463,000)
***E.T.: The Book of the Green Planet.** William Kotzwinkle. Original. Berk-

William Kotzwinkle. Original. Berkley (1,450,000)
Cyclops. Clive Cussler. Reprint. Pocket Books (1,427,000)
The Lonely Silver Rain. John D. MacDonald. Reprint. Fawcett Gold Medal (1,415,000)
Too Much Too Soon. Jacqueline Briskin. Reprint. Berkley (1,381,000)
Hellfire. John Saul. Original. Bantam (1,375,000)
Queenie. Michael Korda. Reprint. Warner (1,351,000)
Mindbend. Robin Cook. Reprint. NAL (1,344,000)
***Deep Six.** Clive Cussler. Reprint. Pocket Books (1,342,000)
***The Miracle.** Irving Wallace. Reprint. NAL (1,342,000)
***Silver Wings, Santiago Blue.** Janet Dailey. Reprint. Pocket Books (1,335,000)
Glitz. Elmore Leonard. Reprint. Warner (1,321,000)
Accidental Tourist. Anne Tyler. Reprint. Berkley (1,304,000)
Contact. Carl Sagan. Reprint. Pocket Books (1,298,000)
The Loves of Harry Dancer. Lawrence Sanders. Original. Berkley (1,288,000)
A Creed for the Third Millennium. Colleen McCullough. Reprint. Avon (1,285,000)
The Last Waltz. Nancy Zaroulis. Reprint. Zebra (1,280,000)
***One More Sunday.** John D. MacDonald. Reprint. Fawcett Gold Medal (1,265,000)
***Wired.** Bob Woodward. Reprint. Pocket Books (1,246,000)
Come Love a Stranger. Kathleen Woodiwiss. Reprint. Avon (1,200,000)
Texas Heat. Fern Michaels. Original. Ballantine (1,200,000)
***The Miko.** Eric Van Lustbader. Reprint. Fawcett Crest (1,200,000)
***Superior Women.** Alice Adams. Reprint. Fawcett Crest (1,200,000)
The Glory Game. Janet Dailey. Reprint. Pocket Books (1,194,000)
Inside, Outside. Herman Wouk. Reprint. Avon (1,180,000)
The Red Fox. Anthony Hyde. Reprint. Ballantine (1,150,000)
***Lincoln.** Gore Vidal. Reprint. Ballantine (1,150,000)
Nightstone. Rick Hautala. Original. Zebra (1,150,000)
***Warday.** Whitley Strieber and James Kunetka. Reprint. Warner (1,146,000)
A Bridge Across Forever. Richard Bach. Reprint. Dell (1,141,900)
After the Reunion. Rona Jaffe. Reprint. Dell (1,141,900)
Palm Beach. Pat Booth. Reprint. Ballantine (1,125,000)
Beaches. Iris Rainer Dart. Reprint. Bantam (1,120,000)
Seventh Secret. Irving Wallace. Reprint. NAL (1,110,000)
***Tough Guys Don't Dance.** Norman Mailer. Reprint. Ballantine (1,100,000)
***Berlin Game.** Len Deighton. Reprint. Ballantine (1,105,000)
***Lace II.** Shirley Conran. Original. Pocket Books (1,103,000)
Strangers. Dean Koontz. Reprint. Berkley (1,100,000)
***Texas Rich.** Fern Michaels. Original. Ballantine (1,100,000)
***Parachutes and Kisses.** Erica Jong. Reprint. NAL (1,092,000)
Sweet Savage Heart. Janelle Taylor. Original. Zebra (1,090,000)
***Ride a Pale Horse.** Helen MacInnes. Reprint. Fawcett Crest (1,085,000)
***Outsider.** Howard Fast. Reprint. Dell (1,075,000)
When Love Awaits. Johanna Lindsey. Original. Avon (1,075,000)
My Mother's Keeper. B. D. Hyman. Reprint. Berkley (1,060,000)
Tales of the Wolf. Lawrence Sanders. Original. Avon (1,050,000)
The Titan. Fred Mustard Stewart. Reprint. Pocket Books (1,037,000)
Smart Women, Foolish Choices. Drs. Connell Cowan and Melvyn Kinder. Reprint. NAL (1,031,000)
Finishing School. Gail Godwin. Reprint. Avon (1,020,000)
A Heart So Wild. Johanna Lindsey. Original. Avon (1,010,000)
To See Your Face Again. Eugenia Price. Reprint. Berkley (1,002,000)
Windsong. Valerie Sherwood. Original. Pocket Books (1,000,000)
Jian. Eric Van Lustbader. Reprint. Fawcett Crest (1,000,000)
Macau. Daniel Carney. Reprint. Zebra (1,000,000)
***The Time of the Hunter's Moon.** Victoria Holt. Reprint. Fawcett Crest (1,000,000)
***Dream of Orchids.** Phyllis Whitney. Reprint. Fawcett Crest (1,000,000)
***Switch.** William Bayer. Reprint. NAL (1,000,000)
***Other Women.** Lisa Alther. Reprint. NAL (1,000,000) ☐

Almanacs, Atlases and Annuals

***Rand McNally Road Atlas: United States, Canada, Mexico.** Edited by Virginia Ure. Rand McNally (3,442,000)
The 1987 Old Farmer's Almanac. Edited by Judson Hale. Yankee Publishing (2,230,000)
***The World Almanac and Book of Facts.** Edited by Hana Lane. Pharos (1,500,000)
J. K. Lasser's Your Income Tax 1986. The J. K. Lasser Tax Institute. Lasser/Prentice Hall Press (1,000,000)
Mobil Travel Guide. Edited by Helen Clark and Alice Wisel. Rand McNally (556,434)
The 1986 What Color Is Your Parachute? Richard N. Bolles. Ten Speed Press (300,000)
***Woodall's 1986 Campground Directory.** Woodall Publishing (300,000)
Rand McNally Interstate Road Atlas. Edited by Virginia Ure. Rand McNally (299,000)
Rand McNally Campground & Trailer Park Directory. Edited by Mary Niles. Rand McNally (281,000)
Taxes Made Easy 1986. The J. K. Lasser Tax Institute. Lasser/Prentice Hall Press (264,000)
Rand McNally Family Adventure Road Atlas. Edited by Virginia Ure. Rand McNally (215,000)
Arthur Young Tax Guide 1986. Edited by Peter Bernstein. Ballantine (203,059)
1986 Bill James Baseball Abstract. Bill James. Ballantine (150,000)
Official 1986 NFL Teambook. NFL Properties. NAL/Signet Special (142,251)
Where to Put Your Money 1986. Peter Passell. Warner (139,038)
Gousha North American Road Atlas 1986. Gousha. NAL/Signet Special (93,301)
Europe on $25 a Day 1986. Arthur Frommer. Prentice Hall Press (91,500)
Rand McNally City & Highway Road Atlas. Edited by Virginia Ure. Rand McNally (91,000)
Woodall's 1986 Tenting Directory. Woodall Publishing (85,000)
Lodgings for Less. Edited by Helen Clark. Rand McNally (83,000)
Automobile Book 1987. Editors of *Consumer Guide.* NAL/Signet Special (79,278)
The 1986 Elias Baseball Analyst. Seymour Siwoff, Steve Hirdt and Peter Hirdt. Collier/Macmillan (71,425)
Rand McNally Motor Carriers' Road Atlas. Edited by Virginia Ure. Rand McNally (67,000)
Gousha Chek-Chart U.S. Road Atlas. Gousha. NAL/Signet Special (65,808)
Handbook of U.S. Coins. R. S. Yeoman. Annual. Western Publishing (65,000)
Rand McNally Road Atlas & Vacation Guide. Edited by Virginia Ure. Rand McNally (59,000)
Roger Ebert's Movie Home Companion, 1987 Edition. Roger Ebert. Andrews, McMeel & Parker (58,000)
Hugh Johnson's Pocket Wine 1987. Hugh Johnson. Fireside/Simon & Schuster (53,000)
The Car Book 1986. Jack Gillis. Harper & Row/Perennial Library (50,175)
Kovel's Antiques and Collectibles Price List 19th Edition. Ralph and Terry Kovel. Crown (50,000)

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Getting Ready for Bologna
Americans at the Fair • The Changing Children's Rights Market
A New Era in Canada • Promoting Children's Books in Britain
The Gallup Survey: Fiction Sales Up in the U.S.

Publishers Weekly

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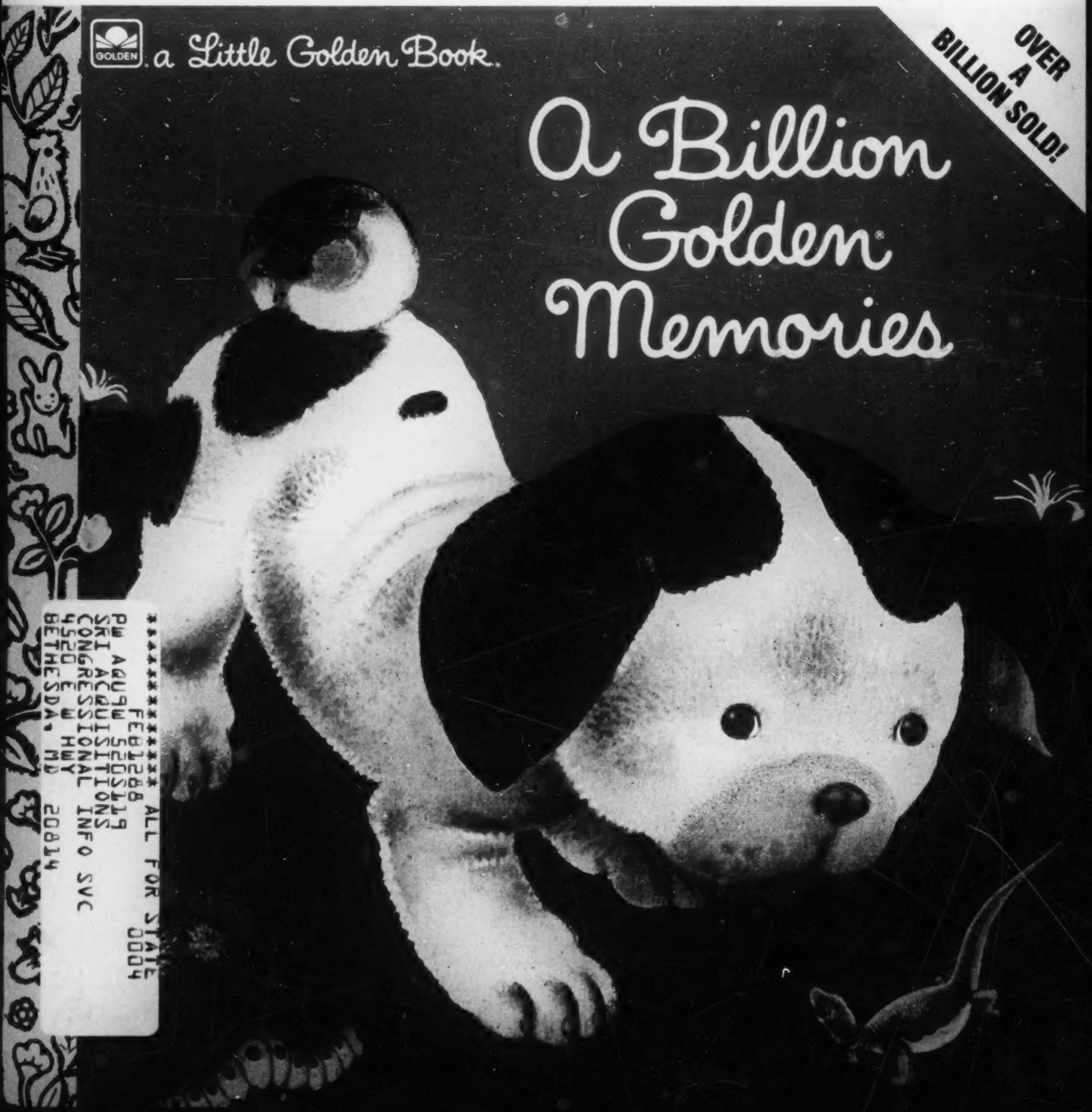
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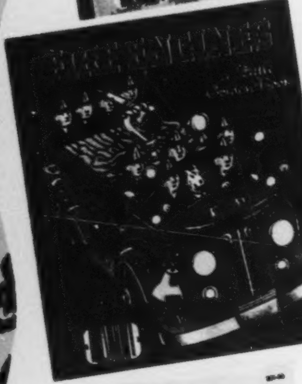

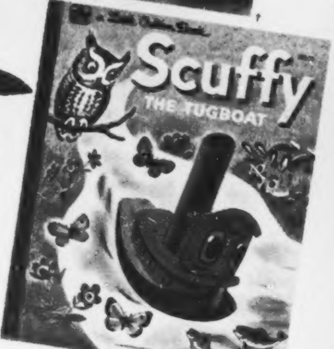

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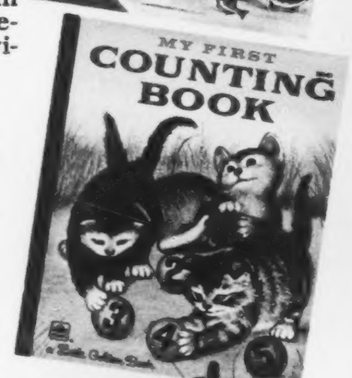

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THE GALLUP SURVEY

EDITED BY LEONARD WOOD

Fiction Titles Are Gaining

Gallup surveys during 1986 revealed that the overall incidence of book-buying among Americans has remained steady at 20%. However, fiction books have expanded their share of total books bought, from 39% in 1984 to 44% in 1986. In contrast, nonfiction books comprised a smaller proportion of purchases in 1986 (40%) than in 1985 (44%) or 1984 (42%).

In terms of subject matter, there have been decreases since 1984 in the proportions of action/adventure/war and historical fiction purchased. History was a smaller proportion of the nonfiction market in 1986 than in 1984, but there was growth in the autobiography/biography and the home & garden/how-to markets. (Table 1).

As has been true since 1984, a majority of 1986 books were purchased in a bookstore (53%). But the proportion of books bought in a department or discount store increased to 11%.

The average price paid for a paperback book in 1986 was $5.36, a 5% increase over the 1985 average of $5.12. About two-thirds (63%) of hardcovers cost over $10, and the average price rose only 1% from the 1985 level of $15.18 to $15.38. (Table 2).

Overall, there have been few changes in the proportion of books purchased at a discount. Hardbacks remain more likely than paperbacks to be bargain purchases. More than one-third (37%) of hardback books were bought at a reduced price from 1984 to 1986. There has been a slight increase in the porportion of discounted paperbacks since 1984, so that in 1986 one in four paperbacks was purchased at a discount. Among books purchased in a bookstore, there has been a gradual growth since 1984 in the proportion sold at less than jacket price; in 1986 about one-fourth (24%) of books bought in a bookstore were discounted.

TABLE 1

TYPES OF FICTION/NONFICTION BOOKS PURCHASED IN 1986

Type of Fiction Book Purchased	TOTAL FICTION BOOKS 1984 %	1985 %	1986 %	Chg.% Pts. 1984–1986
Mystery/Spy/Suspense	18	16	17	-1
Romance	16	16	16	0
Popular Fiction	10	10	10	0
Action/Adventure/War	13	13	10	-3
Science Fiction	10	10	10	0
Children's	na	na	10	—
Historical	12	15	8	-4
Western	4	3	5	+1
Humor	3	4	5	+2
Occult/Supernatural	4	2	3	-1
Other	7	8	2	-5
Don't Know	3	3	4	+1
Total	100	100	100	

Type of Nonfiction Book Purchased	TOTAL NONFICTION BOOKS 1984 %	1985 %	1986 %	Chg.% Pts. 1984–1986
Reference/Instruction/ Computer	16	19	18	+2
Autobiography/Biography	14	14	17	+3
Historical	14	13	10	-4
Religious	9	11	10	+1
Home & Garden/How-To	5	8	9	+4
Leisure	8	6	9	+1
Health/Diet/Exercise	7	7	6	-1
Cookbook	5	5	5	0
Children's	na	na	3	—
Investment/Economics/ Income Tax	4	4	3	-1
Other	13	10	6	-7
Don't know	5	3	4	-1
Total	100	100	100	

NOTE: Results are based on 12,241 telephone interviews conducted among a nationally representative sample of adults, age 18 and older, from January–December 1986.

TABLE 2

PRICE PAID ON ALL BOOKS PURCHASED

	HARDBACK				PAPERBACK			
Price Paid	1984 %	1985 %	1986 %	Chg.% Pts. 1984–1986	1984 %	1985 %	1986 %	Chg.% Pts. 1984–1986
$2.50 or less	6	5	6	0	23	20	19	–4
$2.51–$3.95	4	3	4	0	36	31	29	–7
$3.96–$6.00	8	8	9	+1	21	26	29	+8
$6.01–$10.00	21	18	16	–5	11	13	13	+2
$10.01–$15.00	26	28	26	0	5	5	5	0
More than $15.00	32	37	37	+5	2	3	3	+1
Don't remember	3	1	2	–1	2	2	2	0
Total	100	100	100		100	100	100	
Mean Average	$14.62	$15.18	$15.38		$4.76	$5.12	$5.36	

- C1650-2
4/3/87

How Books Become Miniseries • The New Look in Book Jacke
Dalton Pulls Out of the Video Business • Behind the Lines: Agent Gail Hochman
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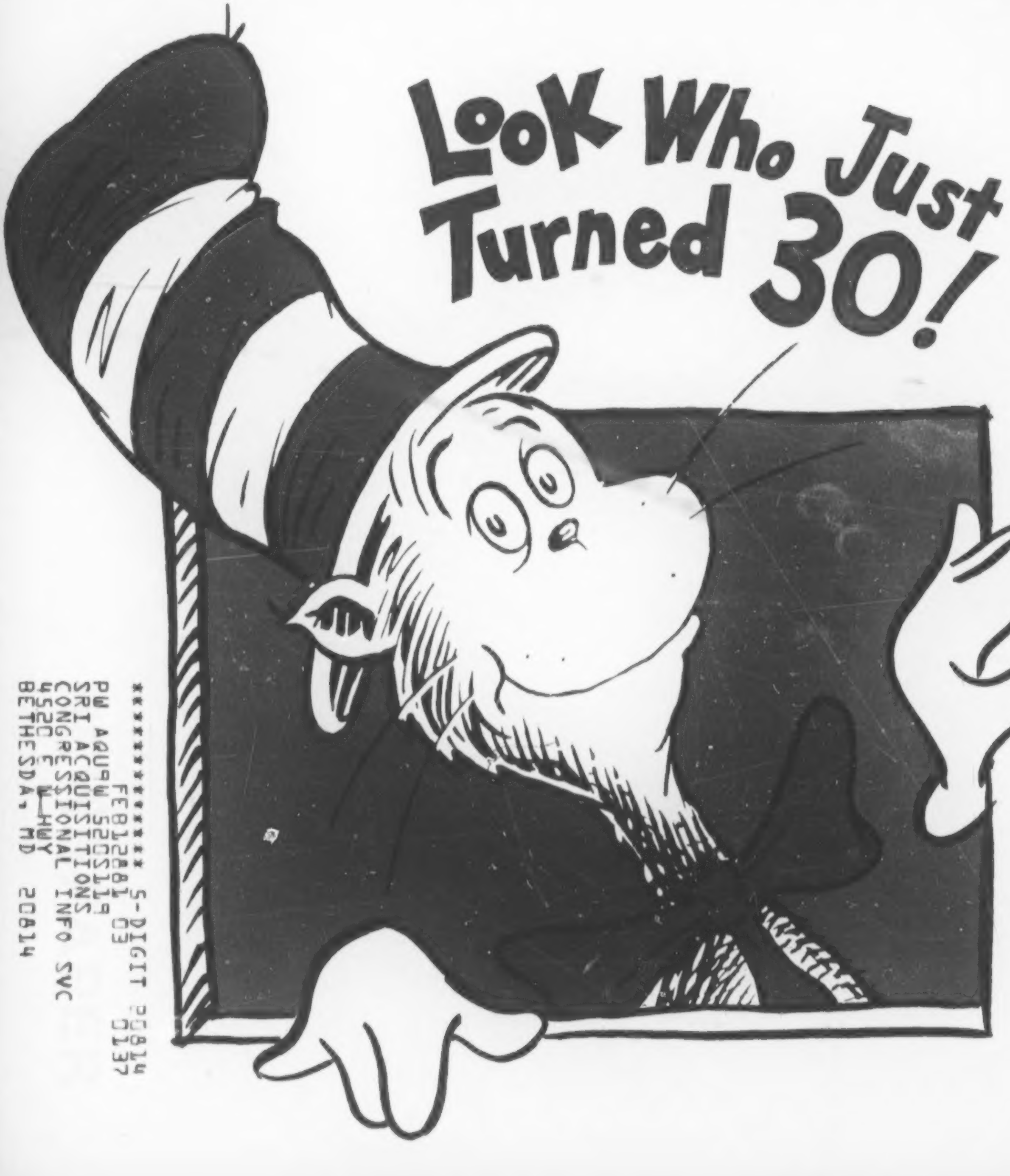
Look Who Just Turned 30!

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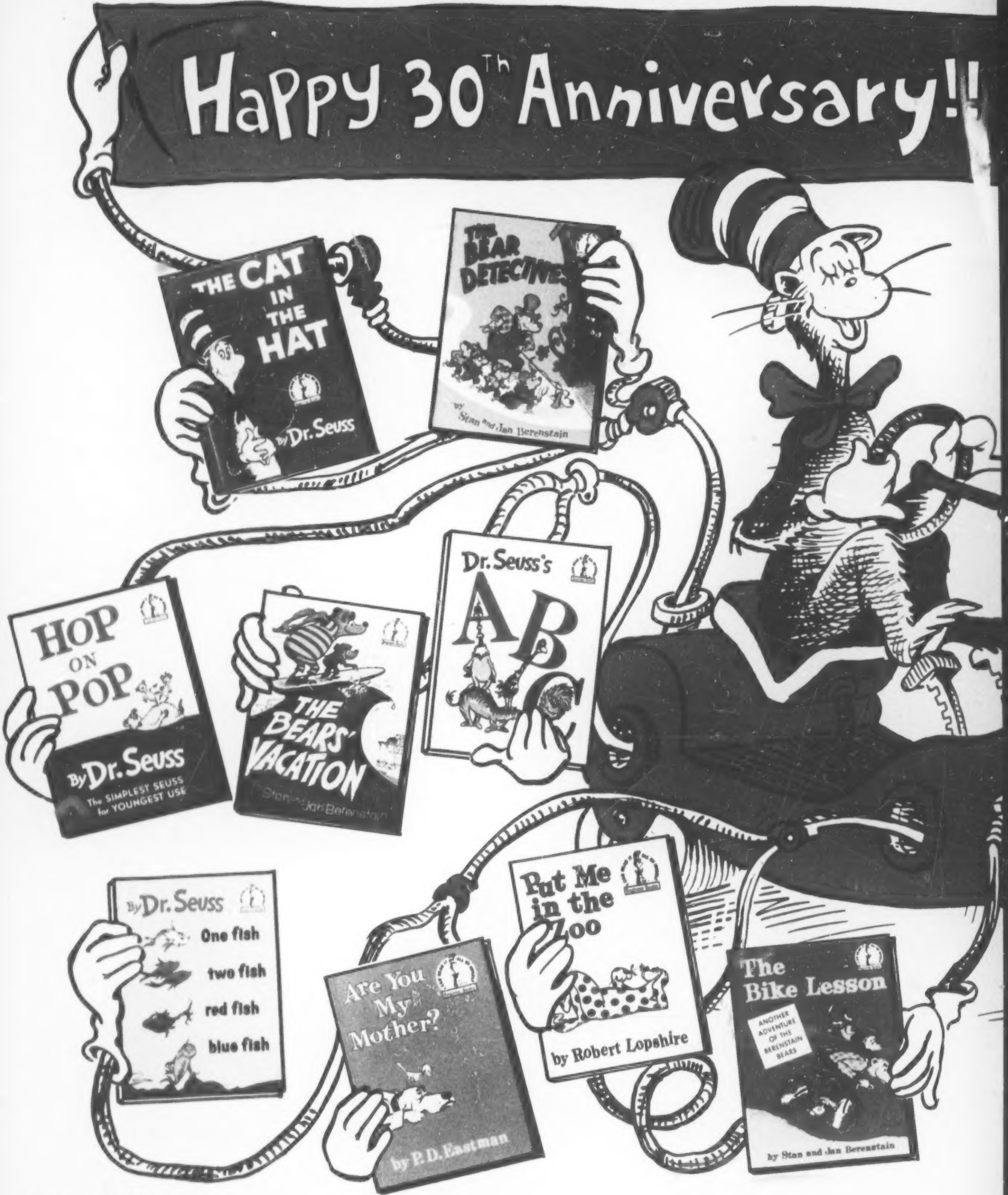
Happy 30Th Anniversary!!
THE CAT IN THE HAT
By Dr. Seuss
THE BEAR DETECTIVES
by Stan and Jan Berenstain
HOP ON POP
By Dr. Seuss
The SIMPLEST SEUSS for YOUNGEST USE
THE BEARS' VACATION
Stan and Jan Berenstain
Dr. Seuss's ABC
By Dr. Seuss
One fish two fish red fish blue fish
Are You My Mother?
by P. D. Eastman
Put Me in the Zoo
by Robert Lopshire
The Bike Lesson
ANOTHER ADVENTURE OF THE BERENSTAIN BEARS
by Stan and Jan Berenstain

The Cat in the Hat © 1957 by Dr. Seuss
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THE DESSAUER REPORT

BY JOHN P. DESSAUER

Slow Finish to Lackluster 1986

Like the twilight economy itself, book sales were less than spectacular in 1986. Trade books held their own because children's continued to perform well and because small publishers contributed more solidly than in the past to the pre-Christmas success of independent retailers. "Big" consumer markets were less successful. Mass market paperbacks declined in both dollars and units, and merchandisers discovered, as they have so often in the past, that during unfavorable economic periods the industry comes to depend more on habitual, discriminating book buyers while many occasional buyers fall by the wayside.

A disappointment in 1986 was the slowing of school purchases, the resurgence of which had been expected to continue at its 1985 pace, but which achieved only about half the predicted growth. College textbook sales showed only modest dollar increases and substantial unit declines. Professional books, on the other hand, registered solid gains in both dollars and units.

Among the market sectors, only general retailers and libraries posted modest unit advances, while the direct-to-consumer market continued to languish. As long as economic conditions continue in their present, lukewarm state, isolated, marginal advances may be all we can hope for.☐

TABLE 1

ESTIMATED PUBLISHERS' NET BOOK SALES—FOURTH QUARTER 1986

(Millions of Dollars and Units)

	Oct.–Dec. 1986		Oct.–Dec. 1985		Percent Change		Jan.–Dec. 1986		Jan.–Dec. 1985		Percent Change	
	Dollars	Units	Dollars	Units	Dollars	Units	Dollars	Units	Dollars	Units	Dollars	Units
Trade	972.0	215.94	919.2	219.32	5.7	(1.5)	2,979.1	697.21	2,710.0	694.78	9.9	0.3
Adult Hardbound	559.1	88.28	563.2	95.76	(0.7)	(7.8)	1,607.9	257.59	1,465.7	248.70	9.7	3.6
Adult Paperbound	245.1	62.10	209.0	58.04	17.3	7.0	802.4	210.81	754.8	227.85	6.3	(7.5)
Juvenile Hardbound	111.4	30.10	98.5	28.95	13.0	4.0	391.5	112.27	344.9	101.31	13.5	10.8
Juvenile Paperbound	56.5	35.47	48.5	36.57	16.4	(3.0)	177.4	120.08	144.6	116.92	22.7	2.7
Religious	210.6	42.20	197.3	43.55	6.8	(3.1)	699.2	145.15	657.6	153.00	6.3	(5.1)
Hardbound	149.4	18.46	138.6	19.03	7.7	(3.0)	493.5	63.38	462.1	67.95	6.8	(6.7)
Paperbound	61.3	23.74	58.6	24.52	4.5	(3.2)	205.7	81.77	195.5	85.05	5.2	(3.9)
Professional	568.4	39.66	497.3	35.06	14.3	13.1	2,533.7	176.99	2,270.9	159.73	11.6	10.8
Hardbound	376.0	13.31	334.7	12.54	12.3	6.1	1,684.2	60.36	1,528.3	57.00	10.2	5.9
Paperbound	192.4	26.35	162.6	22.52	18.3	17.0	849.5	116.63	742.6	102.73	14.4	13.5
Book Club	66.4	12.83	66.3	13.82	0.1	(7.1)	573.2	105.16	560.0	109.21	2.4	(3.7)
Hardbound	53.5	4.55	53.3	4.95	0.4	(8.0)	476.3	41.44	463.8	42.76	2.7	(3.1)
Paperbound	12.8	8.28	13.0	8.87	(1.2)	(6.6)	96.9	63.71	96.2	66.45	0.7	(4.1)
Mail Order Publications	134.1	23.44	144.5	27.22	(7.2)	(13.9)	580.2	114.64	578.5	114.99	0.3	(0.3)
Mass Market Paperbacks	197.2	129.73	221.3	145.76	(10.9)	(11.0)	943.0	571.34	946.8	583.00	(0.4)	(2.0)
University Presses	32.0	2.79	29.5	2.74	8.5	1.8	113.4	11.44	105.1	11.57	7.8	(1.1)
Hardbound	25.3	1.39	23.6	1.40	7.5	(1.0)	81.9	4.59	76.3	4.71	7.3	(2.5)
Paperbound	6.6	1.40	5.9	1.34	12.3	4.7	31.4	6.85	28.8	6.86	9.2	(0.1)
Elhi Text	160.4	28.21	186.0	29.74	(13.7)	(5.2)	1,581.7	256.70	1,478.7	248.86	7.0	3.1
Hardbound	78.0	7.63	105.3	8.04	(26.0)	(5.0)	899.2	90.16	837.2	91.51	7.4	(1.5)
Paperbound	82.5	20.57	80.7	21.70	2.2	(5.2)	682.6	149.95	641.5	157.35	6.4	(4.7)
College Text	401.1	26.73	385.5	28.60	4.1	(6.5)	1,550.8	107.90	1,472.3	120.3	5.3	(10.3)
Hardbound	337.5	17.86	324.0	18.94	4.2	(5.7)	1,306.6	72.48	1,237.3	80.65	5.6	(10.1)
Paperbound	63.6	8.87	61.5	9.66	3.3	(8.2)	244.2	35.42	235.0	39.60	3.9	(10.6)
Subscription Ref.	61.1	0.16	61.8	0.17	(1.2)	(6.8)	215.9	0.56	218.5	0.58	(1.2)	(3.3)
Total	**2,803.4**	**521.89**	**2,708.7**	**545.98**	**3.5**	**(4.4)**	**11,770.2**	**2,215.35**	**10,998.4**	**2,195.97**	**7.0**	**0.9**

TABLE 2

ESTIMATED DOMESTIC CONSUMER EXPENDITURES ON BOOKS—FOURTH QUARTER 1986

(Millions of Dollars and Units)

	Oct.–Dec. 1986		Oct.–Dec. 1985		Percent Change		Jan.–Dec. 1986		Jan.–Dec. 1985		Percent Change	
	Dollars	Units	Dollars	Units	Dollars	Units	Dollars	Units	Dollars	Units	Dollars	Units
General Retailers	2,343.3	373.14	2,160.3	363.55	8.5	2.6	6,664.04	1,042.16	6,102.60	1022.71	9.2	1.9
College Stores	338.6	32.19	326.9	34.03	3.6	(5.4)	2,745.65	247.75	2,614.90	258.07	5.0	(4.0)
Libraries & Institutions	402.6	32.29	369.0	31.32	9.1	3.1	1,386.93	96.45	1,277.10	94.01	8.6	2.6
Schools	360.2	53.44	377.7	61.19	(4.6)	(12.7)	1,828.74	264.69	1,709.10	269.66	7.0	(1.8)
Direct to Consumer	753.9	97.03	747.9	100.83	0.8	(3.8)	2,175.98	281.32	2,112.60	284.78	3.0	(1.2)
Other	20.9	8.87	21.2	9.61	(1.6)	(7.7)	272.13	116.86	249.20	114.83	9.2	1.8
Total	**4,219.5**	**596.96**	**4,003.0**	**600.54**	**5.4**	**(0.6)**	**15,073.5**	**2,049.23**	**14,065.5**	**2,044.06**	**7.2**	**0.3**

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4/21/87

Remaindering Now: Coming to Terms With New Directions in the Book Business
AAP Meets in Key Biscayne • The Paris Book Fair Turns International
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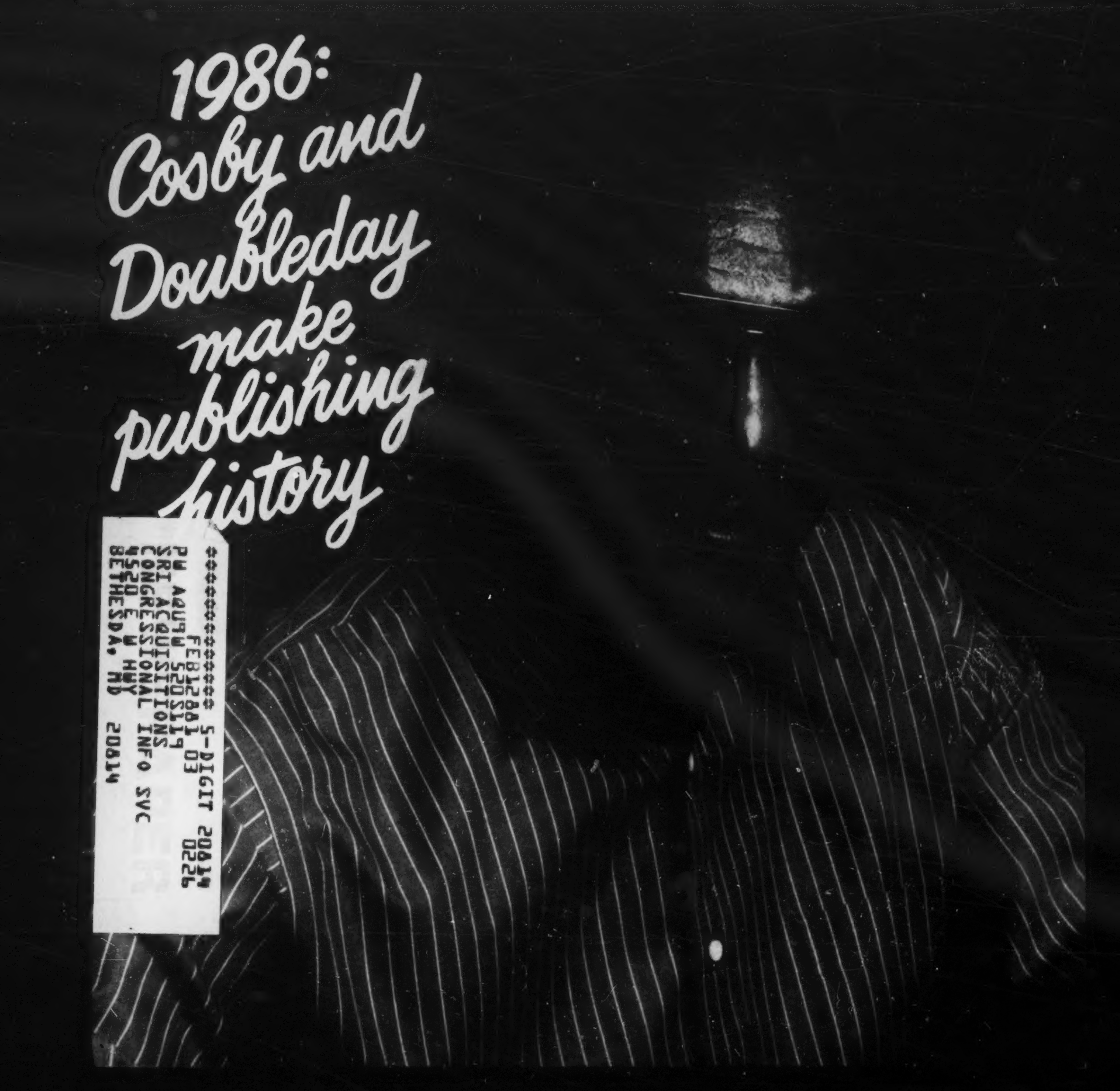
1986:
Cosby and
Doubleday
make
publishing
history

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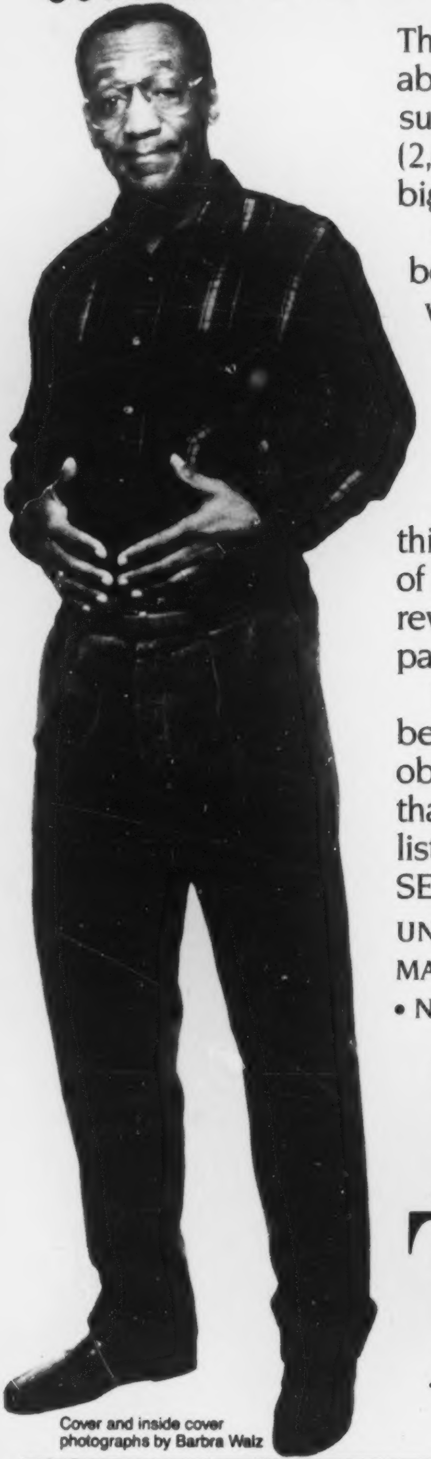
1987: Time flies— and we're doing it again!



The fastest-selling author in publishing history is about to hit 50, and about to hit his stride—surpassing his record-breaking FATHERHOOD (2,622,931 copies in print) with his sunniest, funniest, biggest bestseller yet!

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SEPTEMBER/$14.95/24040-6

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BILL COSBY'S TIME FLIES

DOLPHIN/DOUBLEDAY

Cover and inside cover photographs by Barbra Walz

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There's more on the market than ever with the "megabooks," but dealers give the impact of discounting mixed reviews *by Carolyn T. Anthony*

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HIGHLIGHTS

A Swirl of Issues at AAP Meet

Washington politics, copyright matters, postal rate increases, new approaches to piracy abroad, a new association dues structure and the possibility of affiliate members among suppliers are questions that receive an airing at the lively annual meeting of the Association of American Publishers. *Page 16*

Why Publishing Takeovers?

Industry observers examine the rush by communications conglomerates to buy book firms. *Page 14*

Virago Quits British Chatto Group

Virago is leaving the troubled Chatto/Virago/Bodley Head/Cape publishing group in a management buyout spearheaded by its founding group, including Carmen Callil. Meanwhile novelist Graham Greene, uncle of the CVBC chairman, is highly critical of the group's operations. *Page 20*

'Joy of Gay Sex' Wins in Canada

The Joy of Gay Sex, seized a year ago by Canadian customs for alleged obscenity, returns to the shelves after a Toronto bookstore wins a court battle. *Page 20*

S & S Consumer Publishing Head

Thomas E. Gardner, head of Johnson & Johnson's baby products division, is named to the new position of president of Simon & Schuster consumer publishing. Jack Romanos, president of trade, and Frank Schwartz, president of reference, report to him. *Page 14*

Remainders in a New Era

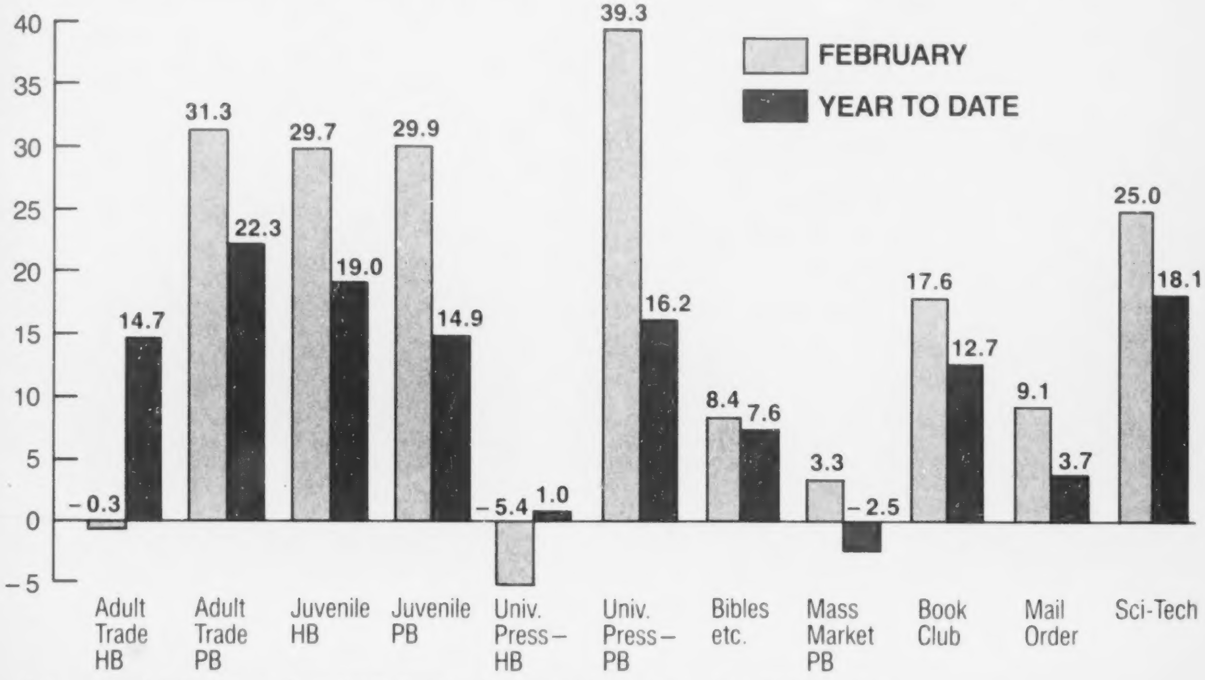
The remainder book business has been both hurt and helped by the growth of the megabook and by widespread discounting in the past few years. *Page 29*

Karp Urges Scrutiny of Mergers

Attorney Irwin Karp, former counsel for the Authors League, urges a closer look by Congress at the current conglomeratization in publishing, saying it raises important copyright and First Amendment issues. *Page 46*

Small Company, Big Bestseller

Health Communications, a small Florida-based company, has had a big success with its trade paperback *Adult Children of Alcoholics* and expects to continue to profit from another book by the same author, Janet Geringer Woititz. *Page 47*



February book sales *figures from AAP show health percentage gains in several categories*

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International Update: Barcelona, Spain's Dynamic Publishing
Graphic Novels: A Burgeoning New Phenomenon • A Candid Talk with Bernie Rath
The Books Women Buy: A New Gallup Survey • Index to April Forecasts

Publishers Weekly

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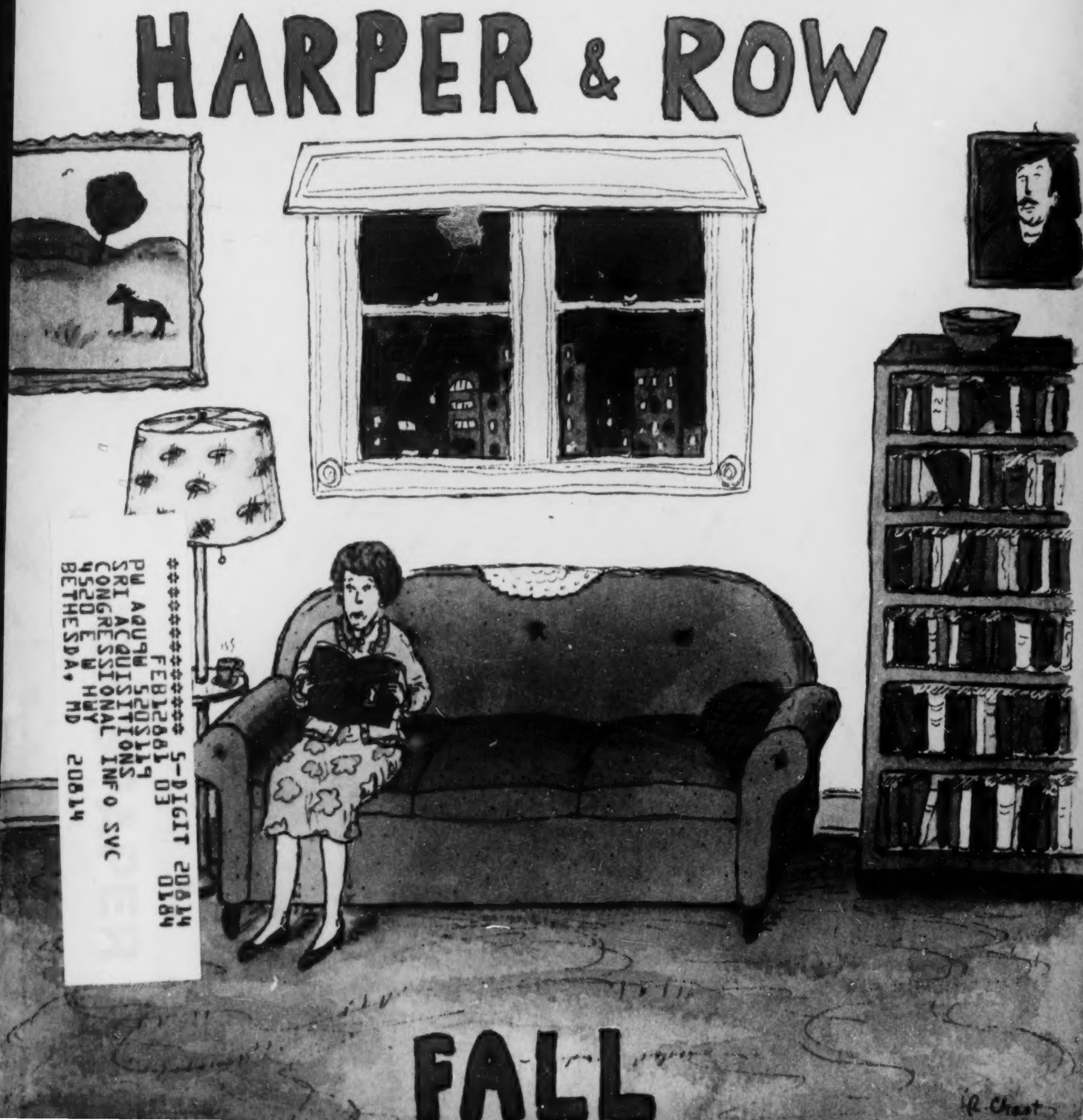

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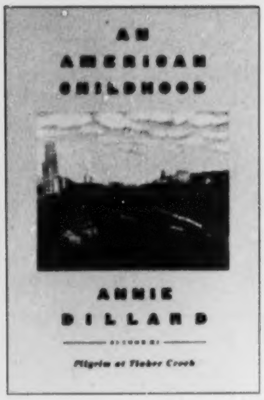

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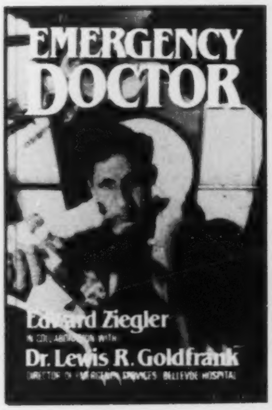

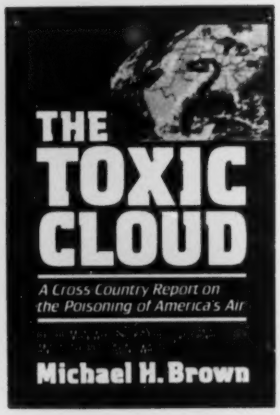

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by Herbert R. Lottman

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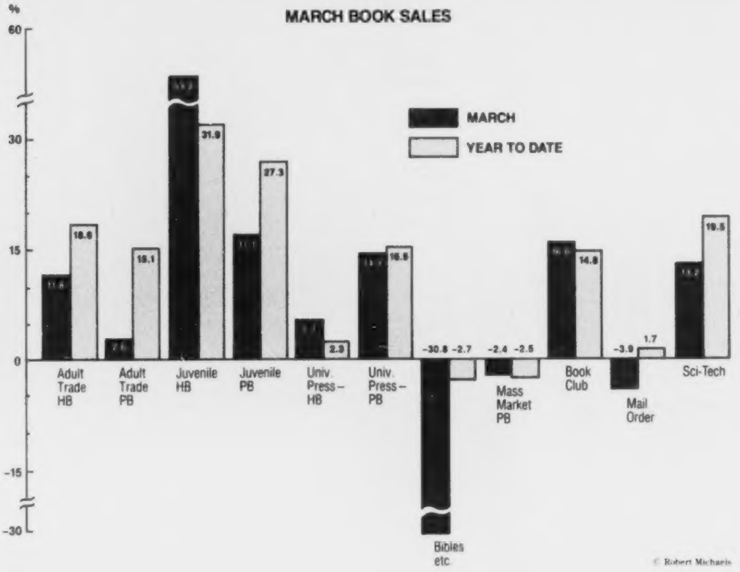
HIGHLIGHTS

Children's hardcover books *were the star performers in the March sales figures released by the Association of American Publishers, with a gain of more than 50% over the same month last year*



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Record Attendance for Washington ABA

More than 20,000 exhibitors, booksellers and others have already registered for the Washington ABA convention, two weeks before it begins, easily eclipsing previous record attendances. *Page 20*

New Look for Obscenity Test

The Supreme Court has refined its *Miller* standard for judging whether an allegedly obscene work has serious literary or artistic value by requiring such judgment by a "reasonable person" rather than by a "contemporary community standard," in a move likely to please publishers. *Page 20*

British Publishers Hail Random Buy

Reaction to the planned takeover by Random House of the British CVBC group was enthusiastic in London, with CVBC executives and other British publishing leaders extolling the greater buying power involved for world English-language rights and the increasing internationalization of publishing. *Page 21*

Wolfe, Fine Launch Mass PB Firm

Former Bantam CEO Louis Wolfe and former Bookthrift president and co-founder Michael Fine have launched Lynx Communications with strong financial backing. Lynx will publish books aimed at the mass market. *Page 20*

Waldenbooks to Hold Own 'ABA'

Waldenbooks, which has withdrawn from the American Booksellers Association, plans its own "mini-ABA" at its Stamford, Conn. headquarters in late June to acquaint its buyers with publishers' fall books and other products. *Page 24*

Women Dominate Book-Buying

The latest Gallup Survey on American book-buying habits shows that women not only buy many more books than men (59% of all books sold in 1986) but dominate such areas as gift books. *Page 27*

Rath: on BOS, Overheads, Wages

In a wide-ranging interview, ABA executive director Bernie Rath discusses the demise of BOS and the problems of escalating rent and salaries faced by independent booksellers today. *Page 49*

Random Buys Warner Audio Publishing

Random House has bought Warner Audio Publishing and will use its backlist as part of a new audio line to be published in addition to AudioBooks. Warner Books chairman William Sarnoff said the Warner operation was not making money and that the audio market had not expanded as fast as they had expected. *Page 56*

THE GALLUP SURVEY

EDITED BY LEONARD WOOD

The Books Women Buy

Since 1984, women have consistently comprised a majority of the book-buying public. During any given week in 1986, 56% of the adults who bought a book were women, and this conforms to the pattern observed during 1984 and 1985. In 1986, women bought 59% of all books, with college-educated women accounting for 33% of those purchases. (Women who had completed high school bought 22% of all books in 1986; those with less education bought 4%).

Women also tend to dominate certain aspects of the book market. For instance, female customers in 1986 bought nearly three-fourths (72%) of all gift books. Buyers of romance, children's books, cookbooks and popular fiction are also overwhelmingly female.

Overall, women buy more fiction (49%) than nonfiction (38%), but education affects buying habits. A majority of the books bought by women who did not attend college were fiction titles (56%), while only 34% were nonfiction. Purchases among college-educated women, however, were only slightly more apt to be fiction (44%) than nonfiction (40%).

The most popular fiction category among women is romance—comprising 22% of women's 1986 fiction purchases. For non–college educated women, the percentage was 29%, while among college-educated women it was 16%. In fact, college-educated women are no more likely to buy romances than mysteries, children's books or popular fiction (all, 15%).

The most popular nonfiction titles among all women are reference books (17%) and biographies (16%), but the likelihood of purchase in these categories varies by education. In the category of religion: the college educated made 7% of all purchases, while the others bought 14%. (See table.)

Nearly two-thirds (64%) of books purchased by all women were in softcovers (34% were hardcovers; of those, 40% were bought by the college educated, 28% by the non–college educated). The proportion of softcover purchases was higher among the non–college educated (71%) than among those who attended college (59%). □

PROPORTIONS & TYPES OF BOOKS BOUGHT

Fiction	Proportion of 1986 Books Purchased By:		Total Fiction Books Purchased By:		
	Men %	Women %	Total Women %	College Educated %	Non-College Educated %
Romance	8	92	22	16	29
Mystery/Spy/Suspense	42	58	15	15	14
Popular Fiction	21	79	13	15	10
Children's	13	87	12	15	10
Historical	35	65	8	10	7
Action/Adventure/War	52	48	7	8	7
Science Fiction	60	40	6	7	5
Humor	45	55	4	4	3
Occult/Supernatural	38	62	3	2	3
Western	66	34	3	1	4
Other	N.A.	N.A.	2	2	2
Don't know	N.A.	N.A.	5	5	5
Nonfiction	Proportion of 1986 Books Purchased By:		Total Nonfiction Books Purchased By:		
	Men %	Women %	Total Women %	College Educated %	Non-College Educated %
Reference/Instruction/Computer	51	49	17	22	10
Autobiography/Biography	49	51	16	15	17
Historical	52	48	9	10	7
Leisure	39	61	10	10	10
Cookbook	19	81	8	8	8
Health/Diet/Exercise	31	69	8	8	9
Home & Garden/How-To	52	48	8	8	9
Religious	45	55	10	7	14
Children's	29	71	4	4	3
Investment/Economics/Income Tax	82	18	1	1	1
Other	N.A.	N.A.	5	5	5
Don't know	N.A.	N.A.	5	3	7

Results are based on 6177 telephone interviews among a nationally representative sample of adult women, age 18 and older, throughout 1986.

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6/12/87

Books into Miniseries—II: The Glory and the Agony
A/V Sales in Bookstores: A New Survey • To Catch a Thief: How Some Booksellers Do It
Editorial: Don't Forget the Libraries • Howard Sams Co.: Mining the Hi-Tech Market

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Who says this is our strongest Fall list ever?

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and that's not all...

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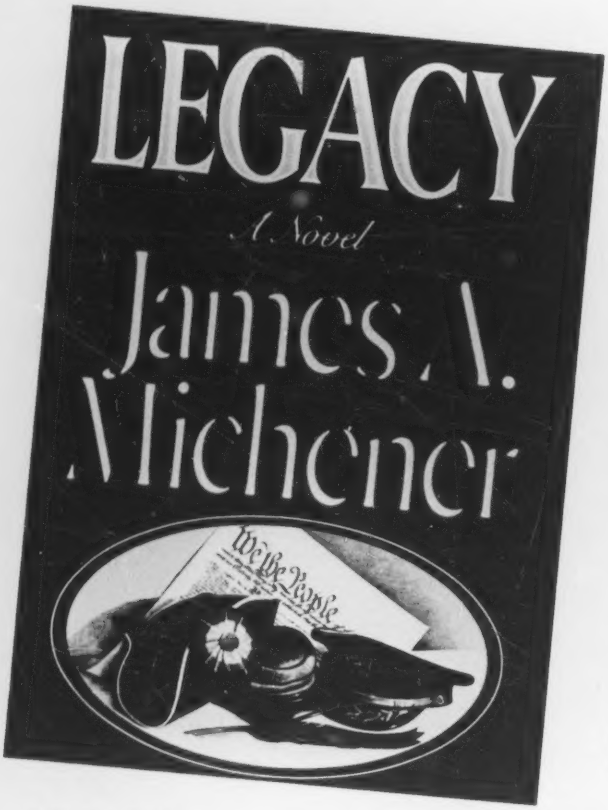

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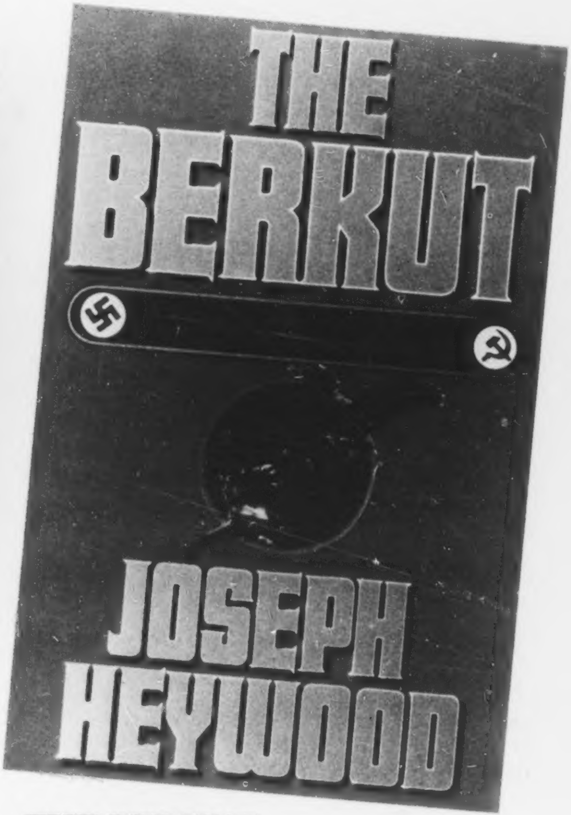

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EDITED BY TOM SPAIN

AV Products on the Move

A PW survey of independent booksellers finds that audio and video growth isn't limited to the national chains

The coming season will bring a deeper commitment to audio and video products from retailers currently stocking them, a new *PW* survey reports. The overwhelming majority of booksellers who have introduced spoken audio, video and music cassettes into their stores plan to maintain or increase inventory levels of those categories in the next year, with expansion the byword for most; only a handful (8% for video, under 5% for spoken audio and music) intend to reduce their cassette inventory.

The survey, conducted for *PW* by Cahners Research, is based on a nationally representative sample of 300 independent and regional chain booksellers.

According to the survey, about two-thirds of the retailers canvassed are selling spoken audio titles, usually for two years or less. Music is in fewer stores—roughly half the sample—but it has been around longer, usually for three or more years. Videocassettes, on the other hand, are a relatively recent arrival, introduced in the last year in over half of the stores that carry video, which represent about 30% of the overall sample. While the 30% figure may seem high, it is in keeping with the Gallup survey reported in *PW* last year (Oct. 17, 1986), which found video in 17% of independent bookstores, with another 10% planning to add video to their stores by summer 1987.

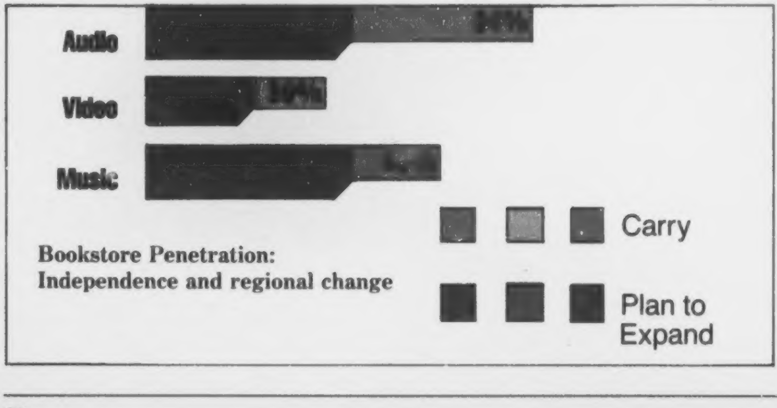
Despite their novelty, both audio and video are carrying their weight for many retailers. Forty percent of the retailers carrying audio report that spoken audio sales are growing as fast or faster than their overall business, a figure that rises to 49% when audio sales are compared only to nonbook sales. The video sales growth rate equals or surpasses the overall store growth in one-third of the video-carrying respondents (slightly more when compared to nonbook sales). Overall, however, music earns the highest marks from retailers. When asked to characterize category sales as either impressive, merely satisfactory, or disappointing, a 60% majority of booksellers carrying music awarded top honors to music, a rating given to spoken audio by 28% of the audio retailers and to video by 16%.

As for future growth among retailers who are not currently marketing cassettes, spoken audio seems to be the category most likely to attract new retailers. Among those booksellers who are *not* carrying spoken audio, 42% report that they would consider the category in the future; music is considered a possible add-on by one-quarter of the stores that don't sell music tapes. Video inspires the most resistance among booksellers: only 11% of the booksellers who are not carrying video say that they would consider it in the future. This "wall" may not be an impenetrable one, however, as a majority (60%) of booksellers who say they will not carry video attribute their decision to an unwillingness to compete with video stores. If booksellers can be convinced that most video stores do very little sales business on top of their rental programs, and frequently offer only a narrow selection of sales-priced titles that does not include a wide variety of subject areas that could thrive in the bookstore environment, the booksellers' hesitation could be alleviated. Profit margins—perceived as a major sticking point for booksellers—are cited as a deterrent from video sales by only 17% of the booksellers saying no to video, an indication of both the deepening margins offered by video publishers and the growing recognition of the differences between video and book business economies.

Audio Picks

What does the typical involvement in audio constitute for booksellers? Retailers carry on average an inventory of about 80 spoken audio titles (up from 55 in 1985), with a total of about 118 units (compared to 80 in 85). The average projected inventory expansion (in terms of titles) is 12%, although a majority plan to increase their inventory by only 10% or less. Most (59%) display audio exclusively in a section they have created for it, although another 31% shelve audiocassettes both in their own section and with the books to which they are related; the remaining 10% display it only with related books.

Children's book-and-cassette packages are the most frequently carried category of audio, in 79% of the stores carrying audio, as well as the category most often targeted for increase; a complete break-down of category frequency and expansion plans is illustrated in the chart at right. When choosing their audio titles, retailers place the most importance on the reputation of the author of the tape, followed closely by the sales performance of the book on which it is based, then (in order) price, reader reputation, packaging, and abridgement status. The proximity of the audio publication date to the release of the book—a time gap that publishers are currently striving to narrow—is the second least important factor to the respondents, who assign less importance



Bookstore Penetration:
Independence and regional change

Categories That Sell—Which categories of audio and video products do booksellers sell? The charts at right show which categories are most frequently carried, and which are most likely to be expanded. The percentages reflect the proportion of stores currently selling each of the overall media formats (audio, video and music) that carry and plan to expand each particular category

only to the publisher's reputation (among the criteria mentioned in the survey). Regarding price, retailers report on average that approximately $7 is the most effective price point for one-cassette packages, and about $13 for two-tape titles.

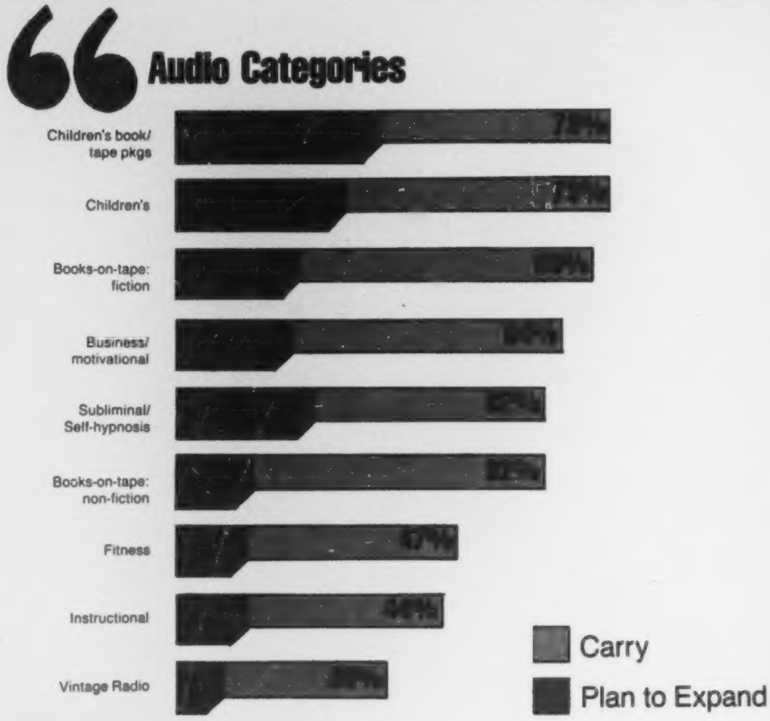
Video Favorites

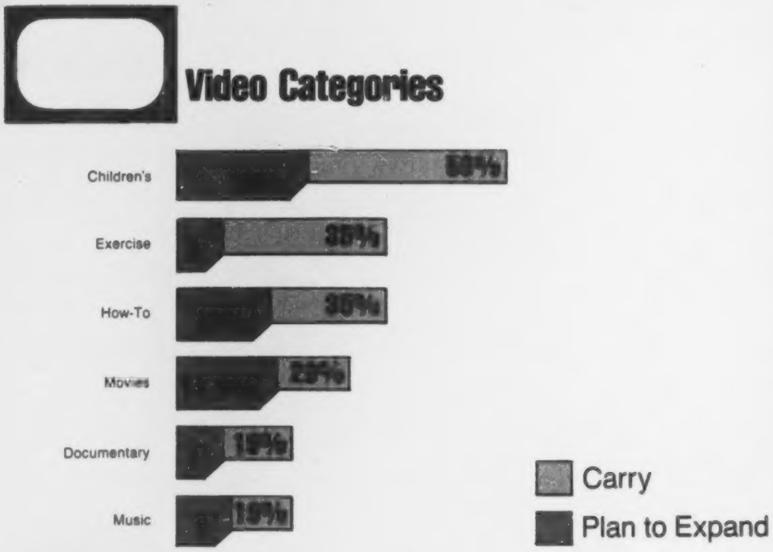
Booksellers are very selective about the video titles that they carry; two-thirds carry fewer than than 50 titles and have fewer than 50 units on hand. Their expansion plans are more ambitious than those for audio, however, averaging out to a 21% increase in the number of video titles in stock; a slight majority (53%) will expand their video selection by 10% or less. Children's video is the most frequently carried category; the chart at right outlines the most frequently carried category, and retailers' expansion plans for each.

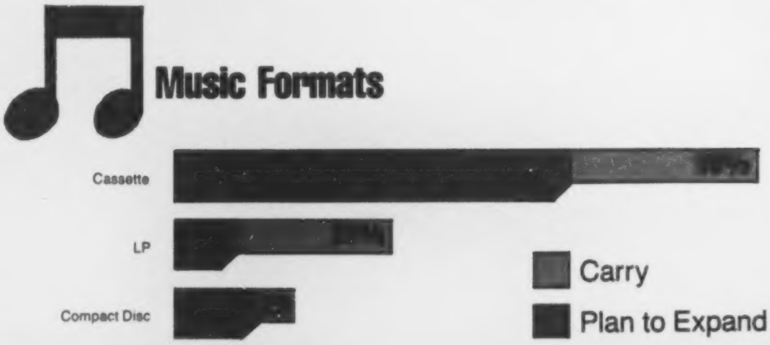
Booksellers report that margins and returns policies are more influential selling points than either product reviews or book tie-ins; only price was considered more important, with $15–$20 the most acceptable price range for adult product, and $10–$15 for children's.

Sounds of Music

The bookstore prevalence of the cassette format for music, and the rapid acceptance of the compact disc at the expense of the standard LP, mirror changes occurring simultaneously in the nation's record stores; a comparison of the three formats' status in bookstores is in the chart at right. What's on these tapes and discs? Children's music is the most frequently carried style of music, appearing in 57% of the stores with music inventory. Classical is a close second, in 56% of the stores. New Age, a newcomer to the bookstore market, is already in 38% of the stores handling music, followed by jazz (33%) and pop (16%). ☐







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ABA in Washington: A Capital Success
Casing the New Lineups in AV • The Changing World of Book Manufacturing: A PW Seminar Report
Fall Previews: New Books by Bestselling Writers • Publishing in the Lone Star State

Publishers Weekly

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THE NEW BREED

W.E.B. Griffin

The phenomenally successful *Brotherhood of War* saga—with 3.3 million copies in print—continues with a magnificent new novel of heroism and adventure. "Griffin is a storyteller in the grand tradition."—Tom Clancy. September/ 0-399-13305-4/ $16.95/A Literary Guild Alternate/A Doubleday Book Club Alternate/A Main Selection of Military Book Club/Easelback available

WHAT TO DO WHEN HE WON'T CHANGE

Getting What You Need From the Man You Love

Dr. Dan Kiley

From the author of the watershed bestseller *The Peter Pan Syndrome* comes an astonishingly effective, action-oriented book for every woman who's ever asked: "Now that I've got him, how do I live with him?" September/0-399-13324-0/ $16.95/ A Troll Book Club Featured Alternate/First Serial Rights sold to *Cosmopolitan*

FORTY STORIES

Donald Barthelme

From the author of "some of the best stories of the last twenty years" (Walter Clemons, *Newsweek*), this collection of forty new short masterpieces proves once again that "if any contemporary writing survives the next century, Barthelme's prickly, hilarious stories will be there."—*People.* September/0-399-13299-6/ $17.95

MANY MASKS

A Life of Frank Lloyd Wright

Brendan Gill

Bestselling author and famed critic Brendan Gill gives us the fullest, fairest, and most engrossing account yet of America's greatest architect—Frank Lloyd Wright. October/0-399-13232-5/ $22.95/First Serial Rights sold to *The New Yorker*

I THINK I DON'T REMEMBER

Art Buchwald

The renowned chronicler of Washington's quirks and foibles collects all the good and bad news of the last two years—as best he can remember it—to provide us with his most hilarious and hard-hitting collection ever!
October/0-399-13325-9/ $16.95

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CROSS CURRENTS

De-oranging Dalton: After five years of trying to persuade management to change to a more contemporary color, Ray Mazorol, Dalton's director of architectural design, says he went to the chain's new chief, Len Riggio, who, observing that orange was good for Halloween and Princeton, promptly said, "Change it!" Mazorol, writing in the Dalton newsletter, doesn't reveal what the new color scheme is, but it will first appear this summer in Store #183 in the Aurora Mall in Denver.

For a brief time the *New York Times* bestseller list recording announced that the #14 fiction bestseller for June 14 would be *More Die of Heart Attack.*

Through agent Bill Adler, Gary Hart is offering a 15-page outline about his career that makes no mention of the reasons for aborting his campaign for president. No one is saying whether Morrow, which cancelled Hart's third book, is looking at the new proposal. Announced for September publication, *One Man's Luck*, "compiled by Jeremy Rosner with Gary Hart," was to be a collection of reminiscences and speeches and was billed in the Morrow catalogue as "An 'only in America' success story of one of our most important leaders." Hart's novel, *The Strategies of Zeus*, published in March, did not take off as well as the first one, *The Double Man*, written with Sen. William Cohen.

According to the *Independent* of London, the British government will not attempt to exercise prior restraint against *Spycatcher*, the controversial memoirs of Peter Wright, retired official of Britain's Secret Service, that Viking will publish in the U.S. next month. The Thatcher government has so far prevented Heinemann from issuing the book in Britain and Australia.

Susan Sontag, one of America's leading intellectuals, has been elected president of PEN American Center. She succeeds novelist Hortense Calisher.

Meanwhile, the New England branch celebrated the founding of the prize that was meant to be. Andre Dubus became the first recipient of the $5000 Sheaffer–PEN New England Award for Literary Distinction. The award, which is to be annual, was founded by Shaeffer Eaton, which makes Shaeffer pens as well as stationery, and honors an author "with strong New England ties" whose work may not have received the national recognition it deserves.

If you picked up from the Atlantic Monthly Press booth at ABA a bound copy of a short story from Richard Ford's collection *Rock Springs*, hold on to it—it may become a collector's item. After the sampler was printed, Ford wrote a different ending to "Children" that will appear in the finished book.

Judge Rules Against Maxwell, Clearing HBJ Dividend Proposal

In the hostilities between Robert Maxwell and William Jovanovich, a federal judge ruled against Maxwell when at 8:30 on the morning of June 8 he attempted to prevent that day from serving as the record date for the issuance of a special dividend by Harcourt Brace Jovanovich.

This particular battle hinged on the value of debentures, of which Maxwell's British Printing & Communication Corporation owns $9.49 million. BPCC also owns nearly 2% of HBJ common stock.

The special $1.6 billion dividend of $40 per share is part of HBJ's $3 billion recapitalization plan to thwart the takeover bid by BPCC. BPCC had sought an early-morning injunction to prevent HBJ from using June 8 as the record date or from setting any other record date "until HBJ is in a position to provide full and fair disclosure to the holders" of convertible subordinated debentures issued last March with an aggregate principal of $200 million. Under HBJ's indenture, the debentures are convertible into HBJ common stock at the conversion price in effect at the time of conversion. The indenture establishes an intricate formula to be used in determining the conversion price in the event of a dividend or other distribution in common stock.

"As a result of the special dividend's size," wrote Judge John F. Keenan of federal district court in Manhattan on June 9, "it now appears that the formula would result in a negative value for the conversion price as of June 9. For this reason, plaintiff seeks the extraordinary measure of enjoining HBJ from establishing a record date for a conversion of debentures."

Judge Keenan ruled that BPCC's "dramatic last minute attempt to prevent a record date was hardly made in a timely manner and is not persuasive" since it knew of the formula's provisions and the record date well before June 8.

If BPCC wanted to get into the dispute involving debenture conversion, the judge suggested that BPCC go to the Florida state court where Sun Bank, trustee for debenture holders, is in litigation with HBJ seeking clarification on the conversion price.

AAP Sales Report for April

Category	% change, April	% change, YTD
Adult hardcover	2.6	12.8
Adult paperback	41.8	22.2
Juvenile hardcover	-5.0	19.6
Juvenile paperback	30.6	29.6
Univ. Pr. hardcover	6.0	6.0
Univ. Pr. paperback	58.9	36.9
Bibles, etc.	23.2	-3.9
Mass market paperback	-6.4	-3.3
Book club	7.5	12.3
Mail order	3.8	1.7
Sci-tech	9.9	14.3
College texts	-30.0	4.4
School texts	1.8	3.3

EDITED BY JEROME P. FRANK

Book Manufacturing: A Changing World

PW's first bookmaking seminar examined implications of the new technology and the pros and cons of printing overseas

Photos © Marianne Yen

***A full house** of publishers, manufacturers, vendors and librarians paid close attention to speakers at* Publishers Weekly's *Book Manufacturing Seminar*

BY JEROME P. FRANK

Against a backdrop of intense industry interest in new technology and printing choices, and the continuing search for new and better ways of holding down bookmaking costs, book manufacturers, publishers, paper and machinery suppliers, and many others, came together June 8 at the New York Helmsley Hotel to attend a *Publishers Weekly* seminar called "Book Manufacturing: A Changing World." This was the first major event to focus specifically on the shared interests of book manufacturers and their book-publishing customers, and by all accounts was a considerable success.

Many of the 175 executives and managers took careful notes as speaker after speaker outlined new uses of technology and debated the pros and cons of manufacturing books offshore.

The all-day seminar, introduced by *PW* publisher Neil Perlman and Jerry Frank, editor of book design and manufacturing, consisted of two panels, "Technology: New Directions," and "Voices of Experience: The Plusses and Minuses of Going Offshore." (See page 52 for the list of participants. Unfortunately, because of a faulty tape, the presentations of Edward McGill, vice-president of production, Random House, keynote speaker on "Book Manufacturing Here and Abroad," and David Zable, vice-president and production director, E. P. Dutton, "Voices of Experience: The Plusses and Minuses of Going Offshore" panelist, were not recorded. Their presentations will appear in the July 3 issue)

To place the book publishing industry in perspective as a part of the overall economy and within its own specialized world, economist James Haughey, vice-president of research and economics at Cahners Publishing Company, painted a fairly optimistic picture of the next two years, as, he said, industrial machinery and commodities and foreign trade markets are expected to improve over that period. "We have two good years ahead: 1987, 1988 and well into 1989, without much prospect of any serious problems in the economy."

Prices and Credit

Haughey predicted price rises, but did not foresee a return to the serious price problems of the 1970s and early 1980s, when prices often rose by as much as 1% a month. He also sees a credit-cost creep within the next two years and pointed out that medium-term bank loans and commercial-paper prices have already inched up half a percent or so in the last month—a trend he sees continuing this year and the next. "So whatever your bank or commercial house is charging you now, it may well be 1½% higher by the time we get to the end of next year."

He predicts an optimistic 9.6% increase in consumer book spending this year—about 4% after inflation—and sees a parallel situation going on in retail book sales. "There was no change in sales in 1985 over 1984, then a drop in 1986, and we are expecting to see a recovery of nearly 9% in 1987, or 3%–4% in real volume," he said. For 1988, Haughey sees a 5% gain (although the real gain will probably be marginal), as 1988 turns into "one of the better years in bookstores since the big surges in the late 1970s and early 1980s."

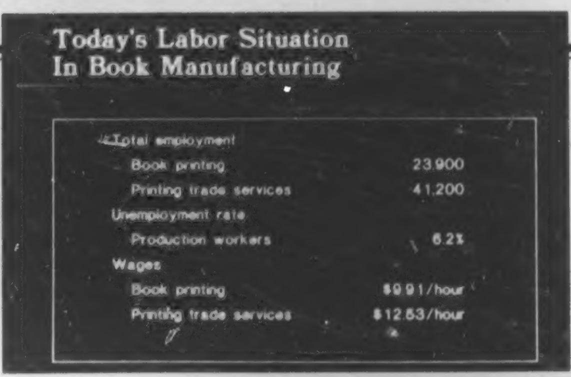
Haughey described the paper market as "fairly strong" and expects U.S. paper production to rise more than 6% this year and more

ADAM JACOBS

***Discussing the broad vista** of new bookmaking technology from electronics and paper to binding and mass market typesetting were, l. to r., Stephen Pekich, Houghton Mifflin, moderator; Henry Mollenhauer, S. D. Warren Co.; Henry Horowitz, Horowitz/Rae; George Alexander, Harper & Row; and Adam Jacobs, Avon Books*

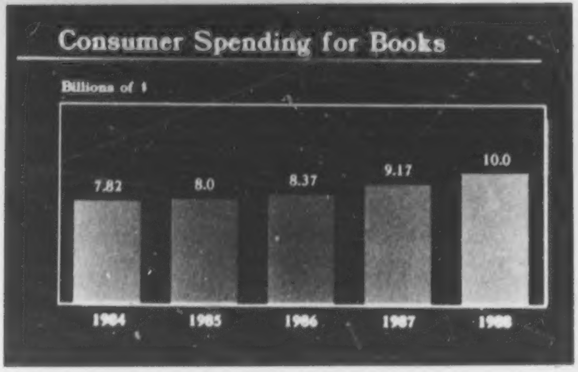
DAVID ZABLE
RUSTY PORTER
TONY HOLLEY

***Evaluating the pros and cons** of printing offshore were, l. to r., Stephen Snyder, Alpine Press, moderator; David Zable, E. P. Dutton; Rusty Porter, Crown Publishing; Paolo Scaramuzza, Mondadori/AME Publishing; and Tony Holley, Mandarin Offset Printing. Keynoter Edward McGill, Random House, was making his presentation off camera*



Today's Labor Situation In Book Manufacturing

Total employment	
Book printing	23,900
Printing trade services	41,200
Unemployment rate	
Production workers	6.2%
Wages	
Book printing	$9.91/hour
Printing trade services	$12.53/hour



Consumer Spending for Books

than 7% the next. Paper outstripped the economy last year, he said, and will continue to do so over the next few years, which will, he forecasts, create increased supply pressure in terms of delivery and price on all kinds of paper across the board. "There has not been much pressure in book papers yet," said Haughey, "but we think it will be coming over the next year."

Bleaker Labor Outlook

He painted a relatively bleak labor outlook as far as available entry-level labor is concerned, basing his outlook on the expectation that the 2% to 4% rise in U.S. employment over the past six years will continue over at least the next two, and on the fact that our population and the number of people entering the work force is shrinking. According to the Cahners economist, minimum wages are likely to rise in response to a shrinking entry-level labor force and the new immigration law requirements. Turning to bookmaking equipment prices, Haughey noted that in the year ending March 1985, prices rose more than two to one compared to the overall economy's equipment price rate and that by March 1986 the rate was almost three to one. Since then, he said, the rate has cooled off and he predicted another drop in the coming year. He pinned the price rise to the weak American dollar against continental European currency, a situation exacerbated by the fact that much of the U.S. manufacturers' bookmaking equipment is made in Europe, where, from mid-1980 to last year, prices rose in response to the strengthening Deutschmark, pound, franc and peso. Now, he said, the process has reversed itself. "All of continental Europe's prices are down, which is going to have a positive impact on your market, so we expect to see prices you pay for equipment, whether domestic or imported, rising less slowly than general equipment prices in the economy in the next couple of years."

Sounding a cost warning to publishers who manufacture their books in Asia or who are contemplating doing so, Haughey predicted a rise of 20%–30% in the value of the Korean wan and the Taiwan and Hong Kong dollar for the next year or two as those countries try to get their currencies back in line with the rest of the world after having kept their currencies artificially on a par with the U.S. dollar. "So if you have some supply contracts out there or are considering some," the economist suggested, "keep in mind that you have that risk."

Key Technology in Bookmaking

Cost, time requirements to manufacture, response to customer needs and communication were singled out as the key operational bookmaking factors by keynoter William Thompson, president of R. R. Donnelley & Sons Co. Book Group, who urged book manufacturers to address each of these factors using emerging technology. His company, the largest printing operation in the country, is dedicated to bringing new technology along, as Thompson made clear by announcing at the seminar the creation of a new "engineering effort devoted purely to the book manufacturing operation." This was part of a corporate plan put in effect over the last few months to break up its corporate manufacturing engineering organization, which worked on technology "literally across our company," into engineering groups that will focus on individual products. According to Thompson, from 1985–1987, Donnelley will have spent "over $75 million on the purchase of technology in our book manufacturing alone."

Looking at new technology developments, Thompson noted that with the advent of desktop publishing and computer-assisted publishing systems, "It's only a matter of time before all pre-press will be generated in the electronic mode, either by the publisher or printer or a combination of both." He added that the "missing link" is a digital plate maker, and that "until that link is established it is not possible to take fullest advantage of new prepress technology. This is where we, the printing industry and our suppliers, must focus effort."

Donnelley's Priorities

Some engineering work Donnelley is concentrating on includes:

- Use of laser technology to eliminate the film step between electronic preliminary work and the press, a development that Thompson foresees becoming available, at least for one-color work, within five years.
- In the press room, Donnelley is concentrating on reducing makeready time, developing ink fountain pre-set, improving plate register through the use of automated stripping machines and closed loop register controls aimed at reducing makeready time and waste, and integrating these systems to reduce human intervention and the time it takes to receive a press O.K.
- Use of narrower webs to reduce makeready time, primarily because it reduces the time requirement of human intervention to reach that

'It's only a matter of time before all prepress will be generated in the electronic mode, either by the publisher or the printer or a combination of both.'

—William Thompson,
president, Book Group,
R. R. Donnelley & Sons Co. Inc.

O.K. It is Thompson's view that if the printer can integrate reduced makeready time and reduced human intervention with improved production strategies, it will be better able to control inventories and improve cash management for publishers. "And how well we can reduce makeready time will determine how well we can produce for publishers requiring shorter runs as demographics become more important," he stressed.

- Use of automatic count control systems to control waste in the press room. "These systems," he said, "force better crew discipline with their capability to control counts accurately and permit us to reduce waste further by better balance of signature counts."
- Integrated case binding lines. "The bindery operation and other operational factors associated with the bindery possibly offer the greatest potential of improvement over the near term," Thompson said.
- Improving off-line operations, such as casemaking and stamping.
- Materials handling, which is extensive in a typical case-binding operation. Donnelley is beginning to develop robotics, more flexible palletizers and computer-controlled inventory, all aimed at reducing labor intensity.
- Substrate materials in the bookmaking process. Thompson sees suppliers working to improve the quality of materials, "but I think we are going to have to work very closely together so materials will keep up as we increase speeds and processes." He explained that "in some cases today because of higher speeds and higher temperatures in the process, we are having difficulty producing quality product with the materials as we know them today."
- The use of computer technology. "Donnelley is developing a computer-integrated manufacturing system for its plants to provide a common database with on-line access," Thompson said. Such a system, which can provide a direct link to publishers that permits on-line status reporting and information flow and is probably two or three years away, "will not only reduce Donnelley's overhead costs, but provide publishers and others in the process with more rapid and effective response to information needs."

Taking on Computerization

Computer-assisted publishing systems are also a high priority item at Houghton Mifflin, which is committed to developing editing systems that will enable editorial staffs to be more efficient and productive, according to Stephen Pekich, HM's vice-president of production and moderator of the seminar's technology panel. One such system HM is experimenting with is in-house pagination. Pekich told the audience that HM has developed its own proprietary coding systems for some classes of publications, has continued to create and manipulate databases for its reference products—which it has done since the 1960s—and continues to computerize such production and manufacturing functions as production cost estimating, purchase orders, accounting, paper storage and, shortly, invoice processing of production work.

The application of computer-assisted book-publishing systems is very much the domain of panelist George A. Alexander, director of publishing systems at Harper & Row Publishers, who was responsible for overseeing the installation of the 16-terminal Penta system at Lippincott, Harper's medical publishing subsidiary in Philadelphia (*PW*, Oct. 4, 1985). Alexander told his audience what they should consider before taking advantage of systems technology, based on 15 months' experience with the Lippincott system. For example, Alexander sees the copy editor as the all-important bridge between the author's electronic manuscript and the typeset result, and until the copy editor is automated he feels the system cannot be installed successfully. To do this, he said, the copy editor "must have a facility that we call edit trace, a record of the editing to present for the author. There is for most book publishers an obligation to the author to show what has been changed, not merely the final edited manuscript, but actually what the old was and what the proposed new is and give the author a chance to respond." He pointed out that with ordinary word processing, one does not get that editing record.

In many cases, Alexander said, the publisher will need new equipment and new training for the copy editor because most of them have always worked on paper. Alexander feels the publisher must take the initiative in making changes to accommodate the system, including taking the task of managing copy flow to a new level and gaining new expertise. "This is not going to be easy," Alexander observed, "but I feel it's necessary if we are to have the promise of electronic aids to publishing work out."

Working with Vendors

Adam Jacobs, vice-president of manufacturing and design at Avon Books, a part of the Hearst Corporation, identified several areas as sources of potential savings:

- "Because of the keen competition among mass market book publishers," he pointed out, "we favor the package and the cover, so we investigate color separators carefully—in the type of equipment they use and in the way they communicate." Jacobs said a publisher can handle separations in two ways: "We can hand the separator a handful of transparencies and simply tell them what is wanted and leave the rest up to them, which means we'll get back proofs that are the separator's version of what is needed, or we can prepare the transparencies by ganging them in sequence and give enough information to let them know what we are looking for plus a mechanical that specifies exact dimensions and layout. Using this approach, we will more than likely get back what we want and it will save a lot of time on both sides."
- "Avon publishes 25–30 new titles a month, which means we deal in high volume," Jacobs explained.

"Therefore, we try to work out volume arrangements with our vendors. This gives them an opportunity to even off their peaks and valleys and gives us an opportunity to work with companies we feel will cooperate to meet our needs."

Lighter-Weight Paper Demand

The need for consistent production of quality products was also stressed by Henry Mollenhauer, national marketing manager of book publishing and magazine papers at S. D. Warren Company, who pointed out that the market today not only demands consistent quality paper, but paper that can keep up with press design upgrades. Publishers today want lighter basis weights, better printing surfaces and better web press runability, Mollenhauer said. He pointed out that paper can be 50% of the manufacturing cost of a book and a reduction in basis weight can provide an opportunity to hold manufacturing costs down. Mollenhauer stated that the paper industry has responded to the need for lighter-weight paper by providing coated free and groundwood products in weights as low as 40 pound that are able to support the increasing use of four-color in college textbooks.

The Warren executive also noted that the paper industry has created better surfaces to take the increasing use of color and better web press runability to reduce waste. According to Mollenhauer, an hour of press time on a five-unit web can be worth $800. "Holes, tears and other web-stopping defects are totally unacceptable. Today, it's not uncommon to run 40,000–50,000 impressions on a four-color web without a wash-out." Stressing the paper industry's help in the printers' war on waste, Mollenhauer said "a reduction of 1% waste on a 38-inch web can be worth approximately $150,000 over the course of a year.

Mollenhauer said the paper industry provides better and more consistent product by using statistical process control (SPC), a method of understanding and controlling process variability. He pointed out that the industry's traditional use of elaborate inspection systems to produce quality products does not necessarily produce quality consistently because "you cannot inspect quality into a product." He added that SPC is also being applied by some U.S. printers "and the combination of SPC at the paper mill and the printer level will ensure continuing improvement in quality and consistency of the end product."

Stephen Pekich: "Houghton Mifflin is committed to developing editing systems that will enable and support our editorial staff to be more efficient and productive"

Henry Horowitz: "New bookbinding techniques and automated advances are being introduced constantly, not only in cost-saving equipment, but in people management and materials-handling innovations as well"

Mollenhauer said the net result of the combination of paper trends over the years will continue to be the introduction of new and unique products to meet changing demands in the publishing industry. One example of a new concept in paper-making he cited was Warren's recent introduction of a new product called Glare-Free Gloss, which takes the best features of gloss-coated and matte-coated sheet and combines them into one product (*PW*, May 15).

Binding Faster at Less Cost

Henry Horowitz, president of Horowitz/Rae Book Manufacturers, pointed out that it is no longer "business as usual" in binderies today. "The question we are now asked," Horowitz said, "is how much faster and less costly can you produce books tomorrow?"

Horowitz's answer was to explain how one bindery—his own—is achieving that goal. "For juveniles, where we enjoy some measure of expertise," Horowitz said, "we have redesigned a Sheridan in-line continuous gatherer, stitcher, side sewer and trimmer, which we call a GSST, to combine four distinctly different operations. We use it primarily for side-sewn, library-style juveniles at a considerably lower cost." Also, his company has on order high-speed, 140-signature-per-minute sewing machines with a three-pocket collator that eliminate off-line gathering, stacking, moving to sewing department, sewing and re-stacking. He explained that the new sewer will have a "revolutionary cutoff mechanism" to eliminate a hand operation. "We plan to conveyorize the separated books to a back gluer and tape reinforcing machine, then feed directly into a single book trimmer, completing the in-line operation."

Horowitz added that as important as savings from the sewer may be, "it pales before the gains possible in casemaking and casing-in. We are planning to acquire a machine designed to case-in juveniles at speeds of up to 160 books per minute, quadrupling the speeds on existing lines." He noted that before one can justify spending upwards of $750,000 to accomplish casing-in 9600 books per hour, a continuous volume of work must be available. "The big question is, can the pipelines be kept filled? My concern is that the potential capacity to produce may exceed the demand."

Horowitz explained that high speed casemakers are also available, units that can produce covers at 120 cases per minute (triple the speed of more conventional casemakers), at an investment of close to $500,000 each. "But can the expenditure be justified when so much casemaking hardware already exists?"

A New Paperback Binding

In an important announcement, Horowitz disclosed that his company is studying the possibility of introducing in the U.S. a style of paperback binding from Finland called Autobind, in which cold glue is applied to the backbone and a paper cover is

Agenda for the PW Book Manufacturing Seminar

James Haughey, vice-president of research and economics of Cahners Publishing Co.: "Trends in Paper, Printing, Binding and Electronic Publishing"

Keynote speaker: William Thompson, president, Book Group, R. R. Donnelley & Sons Company Inc.: "How Emerging Technologies Impact Book Manufacturing"

"Technology: New Directions"
Panel moderator: Stephen Pekich, vice-president of production, Houghton Mifflin.
Speakers:
George Alexander, director of publishing systems, Harper & Row: "Speeding Output with Computer-Assisted Book Publishing Systems.'
Adam Jacobs, vice-president of design and manufacturing, Avon Books: "New Approaches to Paperback Manufacturing and Their Affect on Costs."
Henry Mollenhauer, national marketing manager, publishing papers, S. D. Warren Company: "Trends in Book Publishing Papers."
Henry Horowitz, president, Horowitz/Rae Book Manufacturers Inc.: "New Bindery Technology and Its Impact on the Book."

Keynote speaker: Edward McGill, vice-president of production, Random House: "Book Manufacturing Here and Abroad"

"Voices of Experience: The Plusses and Minuses of Going Offshore"
Panel moderator: Stephen P. Snyder, president, Alpine Press and 1987–88 president of the Book Manufacturers' Institute
Speakers:
David Zable, vice-president and production director, E. P. Dutton
Rusty Porter, vice-president and production director, Crown Publishing
Tony Holley, director of sales and marketing, Mandarin Offset Printing
Paolo Scaramuzza, sales manager, book manufacturing, Mondadori.

affixed only along the hinge, allowing the backbone of the book block to be free of the cover, much like the binding of most hardcover books. Because the binding allows the pages to lie flat, Horowitz explained, it affords the book buyer "the ultimate goal of all our combined efforts, a more pleasurable read."

The president of Horowitz/Rae also described his company's Flexibook binding as a binding style between hardcover and paperback. "It has the appearance of a hardcover book, but is flexible, like a paperback," he said. "It uses the same book block, either sewn or adhesive, notch or spiral bound, and is cased-in, like a hardcover. The difference is that the Flexibook is cased into a flexible 8–25-point pre-printed and laminated paper cover."

Breaking the Offshore Barrier

During the panel on offshore manufacturing, Rusty Porter advised caution when considering offshore work. The vice-president and production director of Crown Publishing—which, together with its Outlet Publishing Co., brings in a very significant majority of its color work as well as a little black-and-white from offshore—warned publishers interested in having books manufactured offshore "to be very careful. This is not a market for the faint of heart." In fact, it took Porter some seven years before she acquiesced to pressure from her marketing department as well as from her own production director, who had made the grand tour to manufacturers in the Pacific Basin, to go offshore with Crown's color work. Now she has been doing Crown's work abroad for eight of her 15 years with the publisher. "My sense of what it's like to work offshore is that it's the same thing as here, only multiplied. You are layering your problems by going offshore," Porter said.

There are things one must get used to, points out Porter: "The inks are put down in a different rotation and it gives you a very different feel. You might like it, you might not. But it's something you have to learn. The papers themselvs are terrifically different. I don't think the foreign market is used to the range and character of the uncoated we use."

She pointed out that English "is almost always *not* the first language. There is a clear, distinct and absolute language barrier. Of course you can solve that to some degree with the New York offices." She urged those in the audience who were thinking of getting into the offshore field to have a long talk with their company first. "You've got to have the fullest support on every level, from your marketing people, from your sales people and from your management people. The shipping time from Europe is two weeks. From Tokyo, it's four. From Hong Kong or Singapore, it's five, maybe six. From Australia, it's definitely six. There are no three-week books. Your sales and marketing people must forecast their needs in a way that you have not had to challenge them with understanding before.

"Secondly," she said, "you must have support from your management to travel and you must, as a company, decide how you are going to budget that. The same job you do here in the U.S. you will be traveling, more expensively, to do offshore." She explained that if one is going to deal with foreign printers, "one needs to understand where they're coming from, their milieu. You need to see their plant." She recommended that if the publisher is a novice in the offshore market, they work through the New York offices of foreign manufacturers. By and large, she said, those New York offices "will take care of receiving your packages of proofs and other materials coming in or going out. They will be taking care of all those customs releases and documentation. And that is an terrific asset."

What does Porter believe is the benefit of going offshore? She felt they were able to buy a little better book at the same price. "How do I feel about being there? I started to say I am an American. I believe firmly in ensuring my own economy and its health, and I frankly love to buy American, and we do so as much as possible." How can a manufacturer bring work back to the States? Porter's answer: "Be all that you can be. Figure out what you do best and do it better. Try to listen to your customers and to your marketplace. Find out what they need. Figure out how to do it. Do it. Sell it. Help us. Teach us. Be there for us. That's one of the things, particularly offshore, that I find the most notable. And more than any other thing in the world, when you tell it, tell it straight and where it's at."

Balancing Offshore Pros and Cons

Two representatives of offshore manufacturing, Tony Holley, manager of sales and marketing, Mandarin Offset Printing, and Paolo Scaramuzza, sales manager, book manufacturing, Mondadori/AME Publishing Ltd., gave their versions of why foreign printers can be an asset to American publishers. Holley, essentially a broker whose firm is headquartered in Hong Kong, described what he considers the benefits and drawbacks of printing abroad, specifically in Hong Kong.

Competition is keen for four-color work, including separations, Holley claims. He disagreed with Porter that language is a barrier. "Most of the recognized companies deal in English," he said, "and there's good Telex, fax and phone facilities available." He noted that shipping is a major benefit, since Hong Kong is now the world's second-largest cargo handling port. This means that "there is excellent service available for delivery for international co-editions." Other benefits he listed include a high level of investment in state-of-the-art technology, particularly in the photographic and printing press areas, and copyright protection in Hong Kong.

The biggest drawback Holley sees is lead time. "This is particularly relevant when you want specific cover materials that have to be brought in." He said that new titles from transparencies and mechanicals to the delivered book in New York would average between 14–16 weeks, including proofs, pages and blues. Reprints take 10–12 weeks.

According to Holley, college and professional products, even those laced with color, are likely to be unsuitable for Hong Kong, both in lead time and in paper quality.

Once the publisher has identified the product to be made offshore, whom does he contact? "Many of the manufacturers you can deal with direct, but there are brokers and agents as well, so the choice is yours."

He added that "brokers normally take significant control of the production process at an early stage and many have offices in Hong Kong with local people who handle production and technical details and interface with the local suppliers. And they may even supply the materials and arrange shipping."

He stressed that brokers can sometimes get much better prices from the same supplier than a publisher can by dealing direct. "This is mainly due to the volume of business that a broker can provide for that supplier throughout the year. And with faster machines and higher productivity, all Hong Kong manufacturers need the added value of business that brokers and agents can bring in to them over and above their established means."

He stressed that "if Hong Kong or any other offshore source meets the price, quality and schedule needs, then a visit is definitely needed to establish the rapport with suppliers and to convey the quality that is required and also to let them know your special service requirements."

Contributions from Abroad

Because printing varies from country to country and between different printers in the same country, it is necessary to consider their merits and failings individually, cautions Scaramuzza. "The success of many recent titles would not have been possible without the contribution of foreign manufacturers, he insisted, "because this has enabled publishers to produce a high-quality product at a competitive price."

He advised those who have never printed abroad to start out by working with manufacturers with a fully operating office in the U.S. "One of the tasks of the representative's offices is to minimize the possible culture shock that Rusty [Rusty Porter of Crown] mentioned and make the communication as efficient as possible between publisher and printer."

He outlined factors to be considered when placing work abroad:

- The publisher must be prepared to make adjustments to the way they operate. When requesting revised proofs, for example, "We must keep in mind that no matter how fast the people are at the plant, it will take 36 hours for the first set of proofs to get there and 36 hours for the second set to come back."
- The need to travel to plants should be considered.
- The distance between publisher and printer means it will take about 10 days for a container to arrrive at the New York dock, with slightly less than a week for clearance and delivery to the warehouse.
- Often stripping and plate making are from positive films, right reading and emulsion side down with no register marks, which means that if a group was originally separated and printed abroad, it might not be so easy to have it reprinted in the States. Not all foreign printers can work from negatives.
- Because offshore manufacturers do not store materials but have them delivered when needed, publishers need to be advised as to when the paper order must be placed and allow delivery time for the paper when scheduling.

Scaramuzza observed that he never met anybody who started going abroad and then suddenly decided to stop it to print exclusively in the United States,"so there must be a good reason for doing so." □

Krueger Buys Nelson's Interstate Book Mfrs.

W. A. Krueger Co., Scottsdale, Ariz., has purchased Interstate Book Manufacturers Inc., Olathe, Kan., from Thomas Nelson Inc., announced Sam Moore, Thomas Nelson's chairman and president and Jack W. Fowler, Krueger's chairman and CEO.

Interstate is a 75-year-old nonunion hardcover book manufacturing company that three years ago consolidated its printing and binding operations into a modern 250,000-square-foot plant in Olathe.

Fowler said Interstate will be operated as the Krueger Olathe Division and offer one- and two-color web and sheetfed printing capabilities and all styles of hardcover binding. According to Fowler, the purchase was a strategic move to give Krueger, basically a four-color printer, entry into one- and two-color markets not previously served and to provide backup and expansion of existing markets and backup bindery capability to Krueger's New Berlin, Wis., book plant. Terms of the sale were not disclosed. Clem Wixten, a Krueger vice-president, will head Krueger Olathe as acting divisional general manager. He was formerly vice-president and general manager of the Jonesboro, Ark., magazine and commercial product division and, earlier, was with Krueger's New Berlin division.

Interstate Book Manufacturers president, R. Gary Armstrong, left that firm to join Nodaway Valley Co., Clarinda, Iowa, as president and chief executive officer of that firm's newly created Publisher's Services subsidiary. Before his top post at Interstate, Armstrong was vice-president of sales at The Book Press in Brattleboro, Vt., and earlier was sales manager in the midwest for Rand McNally & Co.'s book manufacturing division.

Nodaway's Publishers' Services division includes Clarinda Co. in Clarinda; Editing, Design & Production Inc., Philadelphia; Cobb/Dunlop Publishers' Services Inc., New York; and Sly Litho Inc., St. Paul, a color-separation house. The division's services include: manuscript acquisition and development, editorial and design services, production management, typesetting, four-color separation and composition. □

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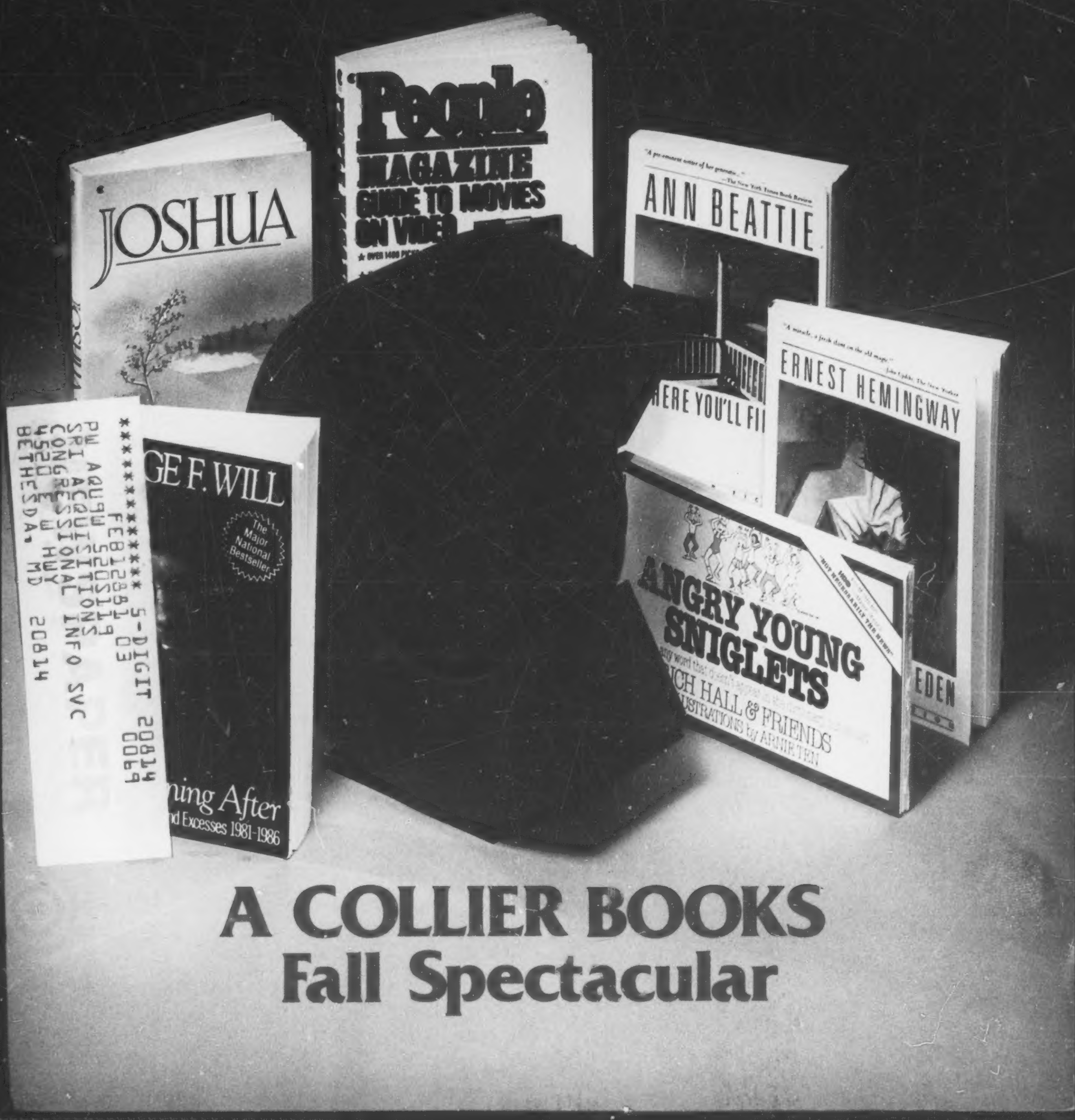
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Book Sales Rise 5.8% to $10.5 Billion in 1986

Book sales in 1986 totaled $10,454,500,000, an increase of only 5.8% over 1985, according to estimates by the Association of American Publishers. In the previous year, 1985 sales rose 8.3% over 1984.

Audiovisual and Other Media showed the greatest increase: 36.5% for College and 28.6% for "Other."

Books registering the greatest increase were in the Business and Other Professional category: 18.6%. Next came Juvenile books, hardbound showing a 15.7% increase and paperbound showing 12.4%

Sales of rack-size Mass Market Paperbacks were nearly flat: 0.1%.

Association of American Publishers
Estimated Book Industry Sales, 1972, 1977, 1982, 1985, 1986

Millions of Dollars

	1972	1977	1982		1985		1986			
	$	$	$	% chg from 77	$	% chg from 82	$	% chg from 85	% chg from 82	% chg from 77
Trade (Total)	444.8	887.2	1355.5	52.8	1988.7	46.7	2095.5	5.4	54.6	136.2
Adult Hardbound	251.5	501.3	671.6	34.3	995.9	48.3	1025.8	3.0	52.7	104.6
Adult Paperbound*	82.4	223.7	452.0	102.1	656.6	45.3	683.5	4.1	51.2	205.5
Juvenile Hardbound	106.5	136.1	180.3	32.5	250.7	39.0	290.1	15.7	60.9	113.2
Juvenile Paperbound	4.4	26.1	51.5	97.3	85.5	66.0	96.1	12.4	86.6	268.2
Religious (Total)	117.5	250.6	390.0	55.6	455.0	16.7	475.5	4.5	21.9	89.7
Bibles, Testaments, Hymnals & Prayerbooks	61.6	116.3	163.7	40.8	174.7	6.7	182.9	4.7	11.7	57.3
Other Religious	55.9	134.3	226.2	68.4	280.3	23.9	292.6	4.4	29.4	117.9
Professional (Total)	381.0	698.2	1230.5	76.2	1561.0	26.9	1722.5	10.3	40.0	146.7
Technical & Scientific	131.8	249.3	431.4	73.0	561.7	30.2	579.1	3.1	34.2	132.3
Business & Other Professional	192.2	286.3	530.6	85.3	630.3	18.8	747.5	18.6	40.9	161.1
Medical	57.0	162.6	268.5	65.1	369.0	37.4	395.9	7.3	47.4	143.5
Book Clubs	240.5	406.7	590.0	45.1	686.7	16.4	698.4	1.7	18.4	71.7
Mail Order Publications	198.9	396.4	604.6	52.5	603.7	-0.1	620.6	2.8	2.6	56.6
Mass Market Paperback Rack-Sized	250.0	487.7	665.5	36.5	761.5	14.4	762.3	0.1	14.5	56.3
University Presses	41.4	56.1	122.9	119.1	147.8	20.3	160.5	8.6	30.6	186.1
Elementary & Secondary Text	497.6	755.9	1051.5	39.1	1481.1	40.9	1604.0	8.3	52.5	112.2
**College Text ** **	375.3	649.7	1142.4	75.8	1325.0	16.0	1409.8	6.4	23.4	117.0
Standardized Tests	26.5	44.6	69.7	56.3	92.2	32.3	96.6	4.8	38.6	116.6
Subscription Reference	278.9	294.4	396.6	34.7	486.6	22.7	501.2	3.0	26.4	70.2
AV & Other Media (Total)	116.2	151.3	148.0	-2.2	199.5	34.8	211.1	5.8	42.6	39.5
Elhi	101.2	131.4	130.1	-1.0	173.9	33.7	177.4	2.0	36.4	35.0
College	9.2	11.6	7.9	-31.9	9.9	25.3	13.5	36.5	70.9	16.4
Other	5.8	8.3	10.0	20.5	15.7	57.0	20.2	28.6	102.0	143.4
Other Sales	49.2	63.4	77.1	21.6	89.7	16.3	96.5	7.6	25.2	52.2
Total	3017.8	5142.2	7844.3	52.5	9878.5	25.9	10454.5	5.8	33.3	103.3

* Includes Non-Rack-Sized sales by Mass Market Publishers of $113.5 million in 1982; $170.2 million in 1985, and $172.9 million in 1986.

**The Higher Eucation Division of AAP has requested the Statistical Service Center to conduct an independent survey of college publishers. For 1986, this survey of 44 college publishers, which in the opinion of the Higher Education Division Statistics Committee represent the majority of known College publishers, reported sales of $1155.7 million.

Anatomy of an Acquisition

Behind the scenes in the recent major changes of ownership in publishing are many stories—scary, sorrowful, triumphant; these are some of them

BY GAYLE FELDMAN

Passion. Intrigue. Greed. High drama. These are the stuff of which novels and book publishing mergers are made. The U.S. publishing business over the past decade has moved in the direction of extremes. As in so many other sectors of American industry, the quickening pulse of mergers and acquisitions in the book world has resulted in some very large and many very small companies, while the medium-size publishing house, rather like the middle class on the island of Manhattan, has become something of a rare and endangered species.

Anybody sitting down to write an anatomy textbook of the American publishing body corporate these days would have to start by compiling a new vocabulary of leveraged buy-outs and golden parachutes, poison pills and white knights, economies of scale and fiduciary responsibilities. And detailing surgical procedures for exploring the state of health of consolidations—such as Gulf + Western/Prentice Hall, Macmillan/Scribners and Atheneum, Bertelsmann/Doubleday, Penguin/NAL and News America/Harper & Row—doesn't just involve clean diagnostic tools like profit and loss accounts, five-year plans, balance sheets and bottom lines. The messy, visceral, unquantifiable emotional and psychological networks of desires and passions and appetites play an equally significant role in the entire process.

The tales of recent concentration in the book publishing industry are often not pleasant ones, but sprinkled amongst the horror stories are some happy endings too, and both should be examined. Why have the recent acquisitions taken place and will the spiral continue for the foreseeable future? Has merger activity of the past few years differed significantly from the previous big consolidation wave of the '60s? What are the nitty-gritty steps in an acquisition, and who are the players? What happens before the deed is done, and what comes into force once the ink has started to dry? What, finally, does all this wheeling and dealing mean for the books that are being produced and the people—authors, editors, publishing personnel of all sorts and readers—who create and use them?

No anatomy of the buying and selling that is going on these days can put everything under the microscope, and this article doesn't pretend to do so. And, understandably, many of those who participated in the process decided that discretion was the better part of valor and opted for an "off the record" presence, which shouldn't discount the importance of what they have to say—for the current wave of consolidation in American book publishing concerns everyone active in the business.

The Merger Scorecard

Apart from investment banks that produce internal records of transactions, the two main sources for listings of mergers and acquisitions in the book publishing industry are Bowker's *Literary Market Place* and *BP Report*. Because the pace of buying and selling has quickened, and because one large sale often spawns several smaller transactions shortly thereafter (for example, Doubleday was sold to Bertelsmann at the end of last year and Bertelsmann has now sold off the Laidlaw subsidiary to Macmillan), no listing can be com-

> *'International Thomson recognized the special culture of our company [Warren, Gorham & Lamont] and the profitability it produced, and we were overwhelmed by their offer. In retrospect, it was a big mistake to sell'*
>
> TED CROSS

pletely comprehensive. Also, the announcement of a deal and its consummation sometimes straddle two years and get lost to the record keepers along the way.

Therefore, the 1987 *LMP* lists 66 American book publishing company transactions as having taken place between 1984 and 1986, of which 29 took place in 1986. *BP*, in its annual surveys, lists 31 transactions in 1984, 41 in 1985 and 24 in 1986. Despite the discrepancy between the two tallies, it is clear that many publishing companies have changed hands in the past three years. Although a number of these transactions take place within the $3 million to $5 million bracket or even less, the past few years have seen some very large sales indeed.

The tables in the article are courtesy of investment bankers Brown Brothers Harriman, and the first shows a selected list of nine major transactions during 1985–87, including the amount paid for the company and its price/revenue ratio. The second chart ranks the leading publishers of trade, college and elhi books, with the asterisks indicating that they have been active purchasers of companies or lists in that field during the past three years. Over half of the companies in each category have grown through acquisitions during that period and their rankings have been affected accordingly. The third table lists market data for selected companies and shows how the feverish activity of the past five years has caused their price/earnings ratios to climb on average from 8.2 to 29.1 times earnings. That is a remarkable increase for any business sector.

Taking the Public Route

Publishing entities are bought and sold for a number of reasons. Historically, companies have been sold because their founders or family owners felt they needed to do so for estate or tax purposes. Bennett Cerf and Donald Klopfer went public and then sold Random House in the 1960s to RCA because they felt that the death of one partner would leave the other and the families concerned too dangerously exposed. Estate worries also came into Walter Minton's decision to sell Putnam, the firm his family had controlled since 1932, to MCA in 1976. Minton explained, "Like so many people in publishing, I didn't know how to work with borrowed money. One of the main reasons for consolidations at that time was that a number of houses like Putnam had been in debt in the 1930s and took years getting back into the black. Once you get out of debt, you don't want to go back in. A lot of companies, faced with no heir apparent or the inability to transfer ownership without putting an excessive tax burden on the inheritor, opt to sell. Like us, fairly large houses usually start by making the firm a public company, which we did in the early 1970s."

That turned out to be problematic, he said, "because returns on invested capital are really very high in the book publishing business—higher than in a lot of other industries in the U.S.—but people who buy shares look primarily at stock prices and in trade publishing the price-earnings ratio used to be low. Companies like Simon & Schuster, Random House and my own found that when they first went public, the share prices increased, but shortly afterward they fell to below their starting figures. I decided I wanted to park the company—I didn't like debt, I didn't have an inheritor, and I saw the need for substantial investment to grow.

"I controlled close to half of the shares and some key people in the company had shares, so over 50% were 'closely held.' We nearly had deals with Harcourt Brace Jovanovich and then with ITT, but the deal that was consummated in the end was with MCA. They owned Universal Pictures and TV, record companies and other properties and didn't own any book publishers. They had great ideas about 'synergies' between books, films and TV, and that was a factor influencing a lot of book company purchases at that time, although I don't think much synergism really exists, and you don't find people making that claim anymore." (In-

TABLE 1

SELECTED RECENT BOOK PUBLISHING TRANSACTIONS ($millions)

Announcement Date	Acquirer/Acquiree	Total Consideration (a)	Price/ Revenues
4/85	Gulf + Western/Ginn & Co.	$100.0	1.3x (b)
5/85	Int'l. Thomson Organisation Gale Research Co.	62.5	2.0
6/85	Reed Holdings Inc./ R.R. Bowker	90.0	2.2
12/85	Holtzbrinck/W.H. Freeman	26.5 (b)	1.8 (b)
10/86	Bertelsmann/ Doubleday & Co. Inc.	475.0	1.1 (b)
10/86	Time Inc./Scott, Foresman	520.0	2.6
10/86	Harcourt Brace Jovanovich/ CBS Books division	500.0	1.7
11/86	Int'l. Thomson Organisation/ Southwestern Publishing	286.4	3.0
3/87	New America Holdings Inc./ Harper & Row	338.0	1.6

(a) *Total consideration is defined as purchase price plus debt assumed*
(b) *Estimate*

Courtesy of Brown Brothers Harriman

terestingly, Rupert Murdoch's purchase of Harper & Row has over the past few months recalled synergism back from the dead.) "MCA recognized that publishing would be a potentially very profitable business to be in, and so we concluded a reverse stock merger whereby a subsidiary company was set up that merged into Putnam and that company then merged into MCA."

The One You Can't Refuse

Traditionally another reason for the sale of a book company has been the making of an offer that cannot be refused. Ted Cross, whose bid set in motion the Harper & Row sale, founded Warren, Gorham & Lamont with his two brothers about 30 years ago They published looseleaf and professional journals and books on law, taxes and financial services.

Cross recalls that "one day, Gordon Brunton, the then managing director of the International Thomson Organisation phoned and asked if we would consider selling. I said no, but he clearly suggested there would be no harm in meeting. And that was the end. He at first offered my brothers and me not less than $60 million plus lots of British blarney and charisma. He eventually concluded the deal for $80 million, which included the sale of an affiliated company. My brothers and I had never had much capital and we never dreamed of anyone putting that kind of value on our life's work. Yes, Michael Brown (ITOL's president) assigned an excessive value to WG&L, but he knew it would be worthwhile in the end. Harper & Row, CBS and VNU had previously approached us, but all of them had thought in terms of traditional valuations—x times earnings. WG&L at that time had $25 million in sales. But over the past six years that figure has grown to about $100 million. ITOL recognized the special culture of our company and the profitability it produced, and we were overwhelmed by their offer. In retrospect, it was a big mistake to sell."

John Suhler, of the investment firm Veronis, Suhler, pointed out that not every publishing sale takes place from a basis of success or harmony. "Sometimes a company isn't doing well and needs to find a strategic partner in order to survive. Other times, if shares are in the control of a number of family members, there are disagreements among them about the future or the risk profile of the business and that initiates the sale process. Also, people see the values being assigned to similar companies in the marketplace and decide it's time to cash in. Once somebody crosses the line to sell, a real momentum builds up—when emotionally the decision has been made, the sale can happen very quickly."

The Motivations for Buying

What motivates the buyers to go on their shopping expeditions? Obviously the desire for growth plays a very large part. According to Richard Witmer, a senior manager with Brown Brothers Harriman, who has advised on 11 book publishing transactions over the past decade, "a large company that accumulates a lot of money in its core businesses has a great deal of unused debt capacity. If you're sitting on a lot of cash, which is a low return, have high tax assets and are not prudently leveraged, you are not earning the sort of return that will make your shareholders happy. Companies are compelled therefore to reinvest their cash in higher yielding properties that give them growth. The dollars involved in buying a book publishing company are generally small relative to the dollars they've accumulated. For example, if you look at Rupert Murdoch's holdings, the Harper & Row purchase, although expensive in book publishing terms, is not really all that large. I suppose it's similar to the way a Japanese insurance company might value a Van Gogh at auction."

Witmer goes on to explain that "until the early 1980s, it used to be possible, when we advised a company to expand through acquisitions, to identify attractive publishing properties, cultivate them, serve as a catalyst and enter into an exclusive dialogue with a potential seller. That's changed and now most companies of a reasonable size ($25 million plus) will use a professional adviser and sell on a competitive basis. Competition is a key factor in why prices have gone up so dramatically."

Another factor pointed out by many analysts is the scarcity element. There simply are far fewer companies of any scale left to buy, and if an extraordinary opportunity comes along—a Chatto, Bodley Head and Cape, a Doubleday or Bowker or Harper & Row—potential buyers will be lining up. As Martin Levin, who spent many years buying publishing companies for Times Mirror puts it, "If you take a really beautiful, flawless diamond. one carat isn't just one carat. It's worth more than anybody else's diamond, and that is the key ingredient in the pricing of a Harper & Row." And of course, the price paid for one extraordinary diamond begins to look a lot less outrageous when the next precious stone comes on the block. Levin continues, "The publishing industry in America has consistently undervalued itself. It's been perceived as a high risk business, but in fact so many companies make a great deal of their money through the backlist, where risk isn't a factor."

The concept of "fit" also plays a large role in many purchases on a grand and not-so-grand scale. David Amerman of Moseley Associates, who formerly was a group vice-president of Prentice Hall, reckons that for Gulf + Western's strategic publishing plan, "Prentice Hall had a remarkable fit. It was almost perfect. In each group that they put together after the acquisition they were able to attain a critical mass that gave them enormous clout." And as Donald Schaefer, currently CEO of International Thomson Publishing, but until the Gulf + Western takeover, CEO of Prentice Hall, points out, those divisions or lists where fit is not so consonant with the acquirer's strategic plan can quickly be sold off to help finance the purchase of what is desired. "Almost immediately, Gulf + Western let it be known that they were going to sell off parts of Prentice Hall. For example, they sold Deltak for $100 million, which meant that the purchase price of PH was soon $610 million rather than $710 million. Furthermore, a purchaser can combine divisions and do other things to make the price less costly."

Large savings can be achieved through combining sales and marketing operations, rationalizing warehouse and computer facilities, consolidating paper procurement and, to a lesser extent, streamlining production and design facilities. Middle-size independent publishers don't benefit from such economies of scale; nor do they generally enjoy the flexibility of small, owner-managed companies. For many medium-size houses, sources for long-term investment to finance growth are inadequate or, as Walter Minton pointed out, the specter of debt simply looms too large.

Some publishers feel that the growth of larger publishing organisms must be considered in light of developments in the retail field over the past 30 years. Ron Busch, whose paperback career has included stints at Bantam, Ballantine and Pocket Books, recalls that "when I started at Bantam in 1957, we didn't have a single customer who represented more than 3% of our total volume. Then wholesalers began to acquire companies all round the country, Ingram became a powerful force, 15 years ago Walden and Dalton came on the scene, followed by Crown and Barnes & Noble a few years later, and you now have huge wholesale and retail operations. Publishers had to respond somehow." Penguin's Peter Mayer agrees. "Few people ask the question—isn't it appropriate and necessary that power centers in retailing be confronted by power centers in publishing?" Mayer also points out that "large, medium-size and even small companies need a modern infrastructure. Many traditional publishers, especially those with editorial backgrounds, haven't made the effort to know the back-end of the business. So another reason for size in publishing is that one can't maximize sales with primitive computer services or warehousing operations."

'People see the values being assigned to similar companies in the marketplace and decide it's time to cash in. Once somebody crosses the line to sell, a real momentum builds up'

JOHN SUHLER

The Global Effect

Two other elements that have emerged in the 1980s need to be highlighted. The publishing business is going global. The woeful state of the dollar combined with limited possibilities in their own backyards have led a number of foreign publishers to start cultivating American gardens. In 1986 buying a Doubleday or an NAL or a W. H. Freeman was not quite so expensive if German marks or British pounds were being used. The traditional international outlook of European publishers and the enormous American domestic market have combined to fuel such transatlantic crossings. And more and more American publishers are waking up to the fact that the information flow can go in both directions, and that "fit" to be extraordinary doesn't have to be made with domestic materials. Random House, Knopf and Pantheon fit exceedingly well with Chatto, Bodley Head and Cape.

The second element is the recognition on the part of a number of corporations, which historically were not significant investors in publishing, that excellent financial rewards can be obtained through the book business. International Thomson has turned from oil to information services and books; and the Newhouse family and Rupert Murdoch have both decided that books, as much as other forms of media, are worth investing in. And of course, such investments are helped along by the decline in interest rates in America and the concurrent equity price increase. Buyers have been able to pay more in part because of the reduced cost of funds.

Finally, in Reagan's America, antitrust barriers that might have previously exercised a restraining influence on concentration—that were brought into play, for example, when CBS wanted to buy Fawcett in the 1970s—are no longer the fashion of the day. Under Reaganomics, big is beautiful, whatever the long-term consequences may be, and the book publishing industry consolidation is consistent with that in businesses across the American economic map.

People get used to a situation and come to accept it as the norm, so that the vociferous protests of the '70s, when companies like Houghton Mifflin and McGraw-Hill were the apples in potential acquirers' eyes, have not been so publicly voiced when a Prentice Hall or a Harper & Row or a Harcourt Brace has been put into play. And the sheer tempo of recent mergers increases the pressure on many companies to go along with the trend.

Although owners who sell—like Ted Cross or Walter Minton or Nelson Doubleday—may regret losing control of their companies, such transactions bring to them a very great deal of money these days. Similarly, for many top executives or as in the case of Harper & Row, for the employees themselves, the pill can be sweetened by golden parachutes, tin parachutes and the like. Once the sugar coating dissolves, though, it can still taste remarkably bitter.

Friendly Fire

What exactly happens when a publishing company changes hands—how can one anatomize the steps involved and the roles of buyer, seller and those who help the whole process along? According to John Suhler, most transactions in the book publishing world are "friendly," with the seller wanting to sell and the buyer wanting to buy. He feels that in book publishing it is an exception to have a takeover, i.e., an "unfriendly" action.

For some people, though, the line between the two gets rather blurred, depending on who is doing the talking. Thus, Gulf + Western may have regarded their bid for Prentice Hall as friendly, but none of the PH employees who were around at the time of the merger and were interviewed for this article shared that viewpoint.

A sale can begin in several ways. An organization such as International Thomson can develop very detailed files on companies like Warren, Gorham & Lamont that they would be interested in purchasing for strategic growth. They can compile such a databank on their own or with the help of investment advisers and can then make the first move and approach a targeted company either directly or through the intermediary of a banker or adviser. On the other hand, an owner like Walter Minton may decide it's time to sell and start making approaches to likely purchasers either on his own or through an intermediary.

'If you look at Rupert Murdoch's holdings, the Harper & Row purchase, although expensive in book publishing terms, is not really all that large. I suppose it's similar to the way a Japanese insurance company might value a Van Gogh at auction'

RICHARD WITMER

Sometimes it's a combination of the two. Peter Jovanovich recalls that his firm "really wanted to buy the Holt publishing operation from CBS. We targeted it and started working on it two years prior to the acquisition. My father wrote to the then head of CBS, Thomas Wyman, expressing his interest. One of our v-p's, Ralph Caulo, did a detailed analysis of the operation. So when the new head of CBS, Laurence Tisch, called us, we were completely ready, and the speed of the acquisition demonstrates that. My father met Tisch on a Thursday and we signed the definitive agreement—about 100 pages—the following Friday."

Often, though, transactions are not so quick, cool and calm, even if they have been strategically targeted by the acquirer for a very long time. A company like Harper & Row may declare to the public that it intends to remain an independent entity, and it may enact certain protective measures to try to ensure that that happens. But no poison pill or golden parachute or staggered directors scheme is foolproof, and sometimes an attempt at enacting such measures can, as it turned out for Harper & Row, be a dangerous gamble in itself. It may be a red flag to those who see the vulnerability of the company and decide to make a bid before any further protective barriers are put in place.

David Amerman recalls once hearing someone quip, "The only difference between a friendly and a hostile takeover is about six months." Although Ted Cross's bid was "friendly," it put Harper & Row into play and a tender offer for the company's shares—an offer that couldn't be refused—was the eventual result. According to Don Schaefer, "Once a tender offer appears, for all intents and purposes a company is sold. There is no antitakeover measure that will protect a public company from a preemptive offer."

Shareholder Responsibility

Brooks Thomas, who resigned as Harper & Row CEO last month, recalls the measures his house tried to take to protect itself. Approaches had been made by investment bankers to Harper directors for some time. "We staggered the terms of the board of directors and last December enacted a 'poison pill.' In January we decided to ask for a reclassification of the stock with unequal voting rights." It was that decision, of course, that triggered the sale.

Thomas continued, "The directors of a public company have an obligation to the shareholders. Recent legal cases have said forcefully to directors that they must run companies for the benefit of stockholders even if at the expense of our other constituencies, for example, employees (although Harper directors in fact controlled 17% of the stock and employees, through their Stock Plan, held 29% of the voting power), authors, readers and maybe even the culture at large. Our job was to run the company for the benefit of all those constituencies, but recently the law has said that the shareholding constituency is the only one you can really care about.

"Cross's move was not totally unexpected. We knew he was there and that he might view the intended reclassification as taking the company out of play. We knew it might push him off the fence, but we also knew that others who were accumulating stock were definitely hostile and we had been monitoring the buying of our stock very carefully. We decided to take a calculated risk. Of course, with hindsight, maybe we shouldn't have gone for two classes of stock, but even if we hadn't, would that have made a difference? That's a question I'll be asking myself for the rest of my life."

One closely postioned observer recalls that "Ted Cross bought the shares in 1983–84 when the price was $16–$17 and is a very shrewd investor. He knew that the company was worth more than his initial offer of $34." The Cross offer came in on a Monday and was discussed by the Harper board the next day. Harcourt Brace Jovanovich put in their $50 offer the following day. When that came in, the situation grew much more tense and the invisible "not for sale" sign began to be taken down. According to some Harper insiders, the management did consider attempting a leveraged buyout when the offers started coming in, but Brook Thomas feels, "We couldn't have earned enough during the next two to three years to support a similar price on the stock market on our own. Remember that on March 10, the day the Cross offer was made public, our shares were selling for $25. Rupert Murdoch offered $65. Frankly, with hindsight, I think we could have said no to HBJ, but when it became evident that people were willing to pay even more, we saw the writing on the wall." After the HBJ offer, Thomas appointed an outside committee headed by Winthrop Knowlton to explore the possibilities and conduct the negotiations.

Harper insiders describe that there was a lot of coming and going of potential suitors and Brooks Thomas has confirmed that some, besides Murdoch, were from abroad. Financial information had to be provided, staff began asking questions and it was clear that most of those courting the company were interested in the least

'Of course, with hindsight, maybe we shouldn't have gone for two classes of stock, but even if we hadn't, would that have made a difference? That's a question I'll be asking myself for the rest of my life'

BROOKS THOMAS

risky areas of its business—that is, everything but the trade division. Rupert Murdoch was the only high-paying suitor who claimed to want the whole operation, and he was the highest bidder as well. The board of directors could have sold the company piecemeal, but wanted to attempt to keep it together as best they could. According to Brooks Thomas, "Rupert Murdoch was physically present for the negotiations, and the committee chaired by Knowlton only had two or three meetings with him and Ian Chapman of Collins (42% of which is owned by Rupert Murdoch). One week elapsed between Murdoch's first expression of interest and the handshake on the deal."

While the negotiations were going on, Thomas saw his role as "keeping the place going. You have to talk to people, to walk around, show yourself, to try to be reassuring and keep the ship afloat. You try to answer questions that you don't know the answers to." Once the Murdoch bid was recommended for acceptance, the official tender offer for $65 a share was made on April 2 by a company called "Harper Acquisition Inc." that had been set up expressly to facilitate the deal. The offer was to expire April 29, and if 51% of the shares were tendered, Murdoch would control the management, but he would have to get at least 90% to be in complete control and avoid a shareholders' meeting that would delay the transfer of ownership by four to six weeks. As it turned out, Murdoch got 96% of the shares by the time the tender offer expired. Brooks Thomas's resignation was announced two weeks later, and Ian Chapman and George Craig of William Collins were put in charge.

The Harper & Row Fit

Many observers feel that the attraction of Harper & Row for Rupert Murdoch lay in its trade list, where links could be forged with his other media companies and where a very special synergy could be found with Collins. Murdoch had tried unsuccessfully several years ago to gain control of Collins, and some observers feel that the Harper purchase will make it more likely for him to obtain control of the British publishing house in future, especially since Collins was unsuccessful in its attempt to enter the American market on its own some years ago.

Certainly the official pronouncements from the beginning envisaged a major managerial role for Collins, although one Harper insider claims that the relationship between Collins and Rupert Murdoch with respect to this particular transaction has yet to be entirely worked out, and goes on to observe that Murdoch will probably pay a lot more attention—welcome or otherwise—to Collins in future. Brooks Thomas confirms that from the initial handshake on, about three or four Collins people, as well as another eight or so from News America, started to make frequent visits to Harper headquarters, collecting a great deal of information about operations, posing legal and accounting questions and interviewing key people throughout the company.

For some Harper people, the atmosphere within the company has been curiously calm, whereas others find it terrible, with meeting after meeting punctuated by question marks in between. One insider describes it as "the calm before the storm. Waves of worry come and go and people are trying to find alternatives in a quiet way. Of course, the parachute of our employee stock plan helps. It's based on salary level and age, and I'd estimate that someone who is 35 years old, earning $30,000 and has been with the company for five years would get between $80,000–$90,000 on the pension plan alone." News America has agreed to carry on the Harper termination policy, vacation days scheme and benefits plan and will after this year either retain the pension plan or provide an equivalent.

What, though, will Murdoch do with the company itself? Some insiders feel that having paid 55 times earnings, and bearing in mind the fact that Collins has never been particularly successful with professional or technical publishing, he will move to sell the professional and educational divisions of Harper & Row as quickly as possible, although they can't all be

TABLE 2

ESTIMATED POSITIONS OF LEADING U.S. BOOK PUBLISHERS 1986

Trade	College	El-hi
* 1. Advance Publications (Newhouse family)	* 1. Gulf + Western	* 1. Gulf + Western
* 2. Gulf + Western	* 2. McGraw-Hill	* 2. Harcourt Brace Jovanovich
* 3. Harper & Row	* 3. Harcourt Brace Jovanovich	* 3. Time Inc.
4. Crown Publishers	* 4. Int'l. Thomson Organisation	4. Houghton Mifflin
* 5. Bertelsmann	* 5. John Wiley & Sons	* 5. Macmillan
* 6. MCA	6. Addison-Wesley	* 6. Scholastic
7. Hearst	7. Dow Jones	7. McGraw-Hill
* 8. Macmillan	8. Houghton Mifflin	8. Raytheon
9. Houghton Mifflin	* 9. Macmillan	9. Addison-Wesley
10. Time Inc.	*10. Time Inc.	
*11. Pearson, plc (Penguin)		

Courtesy of Brown Brothers Harriman

part of the same transactions for tax reasons. Exactly 51% of Harper's revenue comes from trade books, and if the other 49% were lopped off, Murdoch could probably get about $200 million, making the Harper purchase considerably less expensive.

Brooks Thomas has said that he tried to foster in Harper staff "an open mind about change and a positive attitude," but many insiders feel that even the trade division will undergo a cultural change, that the books will become more commercial and less literary. Oddly enough, Brooks Thomas has said that "there was less of an inundation of questions from our trade authors than we had feared. Most of them seem to feel that nothing will change."

What is so interesting about the buying and selling of companies is that the same tale told by different tellers is of course often not the same tale at all. Thus, when Ted Cross was asked about why he made his offer for Harper in the first place, he commented, "After Warren, Gorham & Lamont, my associates and I had bought *Investment Dealer's Digest* and sold it for a considerable sum. I wanted to embark on a challenging new career in general book publishing and had the resources to do it. The First National Bank of Boston agreed to lend me $180 million to finance the purchase. I know people say I simply wanted to put the company back into play, but that's not true. If we hadn't been serious about buying it, a bank like the First National wouldn't have agreed to lend that money in the first place.

"People on Wall Street said to me that if I increased the offer to $40 a share we'd take the company in a cloud of dust. I had plans to bring in a few new people and take a part of Harper in the Warren, Gorham & Lamont direction. We would have built up the professional, legal and database publishing—I would have constructed a database from Lippincott's medical books. When HBJ made their $50 bid, I was stunned, although it would have made them pre-eminent in medical publishing, would have improved their college situation and would have been a defensive tactic to accumulate debt to ward off any takeovers themselves."

Setting the Price

When a company is put into play, how, in fact, is the magic dollar value assigned to it by the potential acquirer arrived at? What do all of these meetings between buyer and seller actually look at? Ted Cross feels that "there are in fact two markets for publishing companies. One is based on economic forces, the New York Stock Exchange market of conventional buyers who are driven by the bottom line of profit and loss. The other market is made on the stage at Sotheby's, where publishing valuations are set instead by dreams, egos, romance and inherent scarcity. Harper & Row turned out to be a classic example of a Sotheby's auction of a fine painting." Dreams and romance, as evidenced by Table 3, have had an extraordinary effect upon the price-earnings ratio average. Richard Witmer agrees, "A company that is led by a strong CEO can be influenced to a large degree by passion—if you want a company badly enough in your portfolio, who's to say what it's worth?"

In acting for a prospective buyer in valuing a publishing company, Witmer says, "We believe it is important to start with the product and not with the financial details. The quality of the list is the foremost consideration. If there is high editorial quality and a demand for that company's books, then we feel the financial performance can be enhanced. If our client isn't familiar with that particular field then, for example, we find people who study the list for us and we also do market research. For professional or business books, we sometimes do surveys based on questionnaires. If it's a college or elhi company, then of course we look at demographics and adoptions.

"If the list is strong and there's good product in the pipeline, we then do a financial analysis of the company as a freestanding entity and as part of our client's organization. We do a basic discounted cash flow analysis which brings the projected cash flows back to present value. We look over a five- and 10-year period, but this first evaluation assumes a debt-free situation."

J. Kendrick Noble, publishing analyst at Paine Webber, explains in greater detail that the cash flow analysis involves "looking at the probable pre-tax income of the company that will be generated over a period of years, adjusted to exclude interest payments, depreciation and amortization as valued at present. You take a long stream of income and apply a risk discount factor which again is based on a certain number of years. If the company is dominant or unique in its field, it might be looked at over a 10-year period; if it is well established, then it would be a seven- or eight-year factor; if uncertain but not in trouble, then perhaps five years. If the risk discount rate is at 10% and you think the company will grow at a rate of 10%, that approach equals the number of years times last year's pretax income or the number of years times last year's income after tax, and that gives you your figure."

The Process of Due Diligence

But the analysis does not stop there. Witmer continues, "We look for potential savings in distribution and marketing, but not in editorial. In my opinion, there's often a misunderstanding about the editorial sector. You usually in fact plan to increase investment in that area, since you want to maintain the relationships with the firm's successful authors and to create new product. Your financial projections are a function of a lot of things—the company's management and what you intend to do with it, the product in the pipeline, the company's book pricing policy, the nature of their royalty agreements, hidden assets like unused real estate, excess pension assets and cash, the backlist and the competitive environment in the marketplace for the product. You also look at how the company is capitalized and whether they have any debt. Part of the analysis is of course who else we think will be bidding for the publishing house and how high we reckon they are willing to go, and what similar transactions have gone for in the recent past.

"If the company for sale is private, then after you qualify as a 'serious' bidder with them, they will give you access to additional information. They might give you a day or two to interview management, and you go back and fine-tune your analysis in light of due diligence and the bid date by which you must submit your definitive offer. You then put it into a letter, setting forth all the conditions of your offer. Anything can happen after that. Generally, you turn out to be one of a limited number of serious contenders and may be given an opportunity to improve your offer if you wish."

About the only governmental brake that can be applied to a prospective merger falls under the Hart, Scott, Rodino amendment to the Clayton Anti-Trust Act. If one

'As quality publishers, Scribners and Atheneum believe that editorial independence is essential and that [merging] is the preferable alternative to the current tendency in publishing toward takeovers by conglomerates'

CHARLES SCRIBNER JR.

in 1978, six years before selling to Macmillan

of the two companies involved has assets or net sales of $100 million or more, and the other company involved has assets or net sales of $10 million or more, then pre-notification of the intended merger must be filed with the Justice Department. A waiting period must then elapse during which the government can investigate the implications of the transaction as it impinges on competition in the marketplace. None of the megamergers that has taken place recently has caused the government to have second thoughts.

According to Richard Witmer, "If the company under consideration is public, then a lot of time is devoted to working out how to reduce deal risk. An acquirer's various options include accumulating stock in the marketplace, buying a substantial block of shares, negotiating a merger agreement or effecting a tender offer or some combination of the above. What route you take depends on the particular circumstances, including your assessment of likely competition." Unfortunately, some observers have commented that not all routes that have been taken to acquire companies have been entirely straight and narrow. Reportedly, one company trying to orchestrate an acquisition tapped into a board member of the targeted house for inside information that helped them in assessing exactly how much to bid—an action that was rather dubious legally. Companies have also been known to approach investment or consulting firms that have been engaged by a targeted house in the past to get detailed financial information that would put them on the inside track in negotiations.

Hindsight Wisdom

Even when all parties agree that their particular publishing marriage has been made in heaven, things often don't work out quite as they had planned. In 1978, Charles Scribner's Sons and Atheneum Publishers merged. At the time, Charles Scribner Jr. said, "We are both medium-size publishers. This will make us a larger medium-size publisher and still allow us to keep our identities." In the statement released by both companies announcing the merger, the publishers said: "As quality publishers, Scribners and Atheneum believe that editorial independence is essential and that this decision is the preferable alternative to the current tendency in publishing toward takeovers by conglomerates" (*PW*, Aug. 7, 1978). However, less than six years later, Macmillan was buying those self-same merged Scribner Book Companies, although Charles Scribner Jr. at that time again hailed this development as "a fabulous move." By the end of last year though, Macmillan's general books division, into which the Scribner Book Companies had fit, was announcing that its adult hardcover new publishing program would be reduced by 35% in 1987 along with a reduction of 20 jobs. What happened along the way?

One observer looks back to 1978 and the reasons for the original merger. "Atheneum had had a run of bad luck in their new publishing program and they didn't have a substantial backlist to sustain them. They ran up a great deal of debt and owed a lot of money to Scribner, who did their warehousing. The merger took place because Scribner wanted to grow through building a larger company and Atheneum wanted to do something to relieve their financial situation, but this in fact proved to be a drain on Scribner's own health."

Despite Charles Scribner's personal commitment to publishing, problems started to multiply when the families owning the company were offered a great deal of money for the Scribner warehouse in New Jersey, which had acted as a distribution center for many different publishers. The families decided to take the path of least resistance and at the same time entered into what they thought would be an efficient, cost-cutting arrangement with Arcata, the printers, to go into a new facility in Tennessee. Unfortunately, the timing proved to be more than a little ill-advised.

The construction of the new warehouse and ramifications of the move meant that it was impossible to get the books out to the bookshops, and worse still, the company missed an entire sales season. As Peter Mayer pointed out earlier,

TABLE 3

MARKET DATA FOR SELECTED BOOK PUBLISHING COMPANIES

Company	Market Value ($ millions)	Price/ Earnings on 3/30/82	Price/ Earnings on 6/2/87	Price/ Revenues	Price/ Book
Addison-Wesley	154.8	8.4x	21.9x	1.0x	2.8x
Harcourt Brace Jovanovich	2,182.8	5.2	38.7	2.1	4.3
Harper & Row	283.6	5.8	54.4	1.3	4.0
Houghton Mifflin	537.8	6.2	23.8	1.7	3.7
Macmillan	1,345.0	12.9	25.6	1.6	4.6
McGraw-Hill	3,207.8	12.7	21.6	2.0	3.7
John Wiley & Sons	162.7	6.2	17.5	0.8	1.7
Average		8.2x	29.1x	1.5x	3.5x

Based on most recent end-of-period financial statements; comparison of price-to-earnings ratios in columns two and three show last 12 months' earnings from continuing operations as per most recent end-of-period financial statements.

Courtesy of Brown Brothers Harriman

getting the back-end operation of a publishing company right is these days crucial to continued success, and the difficulties of the move to Tennessee bled the resources of the company.

Early in 1984, Marvin Brown and Franklyn Rodgers, who were among the senior executives of the company, left for other jobs, and although financial health was being restored, Scribner people took their departures as a sign that further change was afoot. Rumors circulated within the house and a number of other executives decided to place their futures elsewhere. People within the company felt that a sale would take place but, surprisingly, word of the negotiations that were in fact going on between Macmillan and the Scribner Book Companies did not leak out. Reportedly, the two families—the Schieffelins and Scribners—who controlled the company chose not to go to outside investment advisers for help. Since the owners seemed to value privacy above market-driven considerations, they approached Macmillan themselves and there was no competitive bidding. Many observers feel, therefore, that when the deal was consummated for $15 million, that figure did not adequately represent the true value of the business.

Before the sale was announced internally, Macmillan had begun to take over the company's warehousing and distribution, so employees sensed that a change in ownership was not far behind. Just before it was made public, employees were informed with the usual assurances that nothing of substance would change and that no staff member need worry. One employee at the time recalls that "we were appalled, once news began to leak out, at the denials that were made. We felt that people on the outside wouldn't believe anything coming from this house again. And in retrospect, the Scribner family were like most people who sell something—they thought that they would be able to benefit from lots of Macmillan investment capital and that they would still be able to keep the company as usual.

"Nelson Doubleday no doubt thought the same way about the sale of his company. It comes as an enormous shock to most private family owners to discover that changing hands usually means changing who is in the driver's seat." Walter Minton knows this all too well from his own experience in selling Putnam to MCA. "Anybody who sells and expects no change in a short time is usually out. If you have run your own company, you think you can tell others what they should buy or do—but you can't."

One former Scribner employee takes up the story: "Things started to happen instantly. The day after we were told of the sale, someone from Macmillan personnel came to give us a session on our retirement plans. We were shown a film about Macmillan Publishing and sat there dazed, realizing that the culture of our company just would not be the same." The sale was effective on June l, 1984, and throughout the early part of the summer, people had the feeling that they were drifting along, waiting for the larger waves of change to follow. One development that took place very early on was the introduction of a kind of bureaucracy that the company had previously never labored under—suddenly form-filling and three- and five-year plans were the fashion of the day.

Good News/Bad News

As Richard Witmer pointed out when describing how a firm is financially analyzed, hidden assets often prove to be rather valuable. Thus, when the Scribner pension plan was changed as a result of the Macmillan purchase, years of service at Scribner suddenly didn't count towards retirement (this is often the case). Two weeks severance pay for every year of employment was halved and the Scribner tradition of closing early on Friday afternoons was stopped instantly. On the other hand, although contracts were changed, there was no difference of any substance between the old and the new, and advances to authors—partly as a result of Macmillan capital—were generous.

Perhaps the most visible sign of change came in August 1984 when it was announced that in a separate deal the Scribner family was selling the famous Fifth Avenue building that housed its offices and bookstore to the Duane Reade Drug Company. After the sale of the building, the store itself was sold to Rizzoli, since without the subsidized cheap rent that came from owning the building, the family found that the finances of their bookselling operation were rather altered. The new rent also proved to be unattractive to Macmillan and so the offices of the merged book company had to relocate as well. Unfortunately, the new premises that Macmillan had contracted for Scribner were not quite ready when the move was due to occur, but it went ahead anyway, prematurely, in order for Macmillan to avoid paying rent on two different buildings. One former employee describes those months immediately after the move in autumn 1984 as "a totally demoralizing experience. Nothing seemed to work—electricity, plumbing, heating weren't ready for us—and the worst thing of all was the phones. Just after the move, we had a book that was hitting the bestseller list and our phones didn't work. Can you imagine a publishing house with no phones? It was a nightmare."

During the course of the following year, the sales forces of the two firms were combined and the children's book imprints of the companies were folded into one group. The personnel and financial departments were controlled by Macmillan people. When the shakeup in adult trade publishing at Macmillan came in the autumn of 1986, many observers, given the course of the merged companies' history up until then, were not entirely surprised. As one publisher put it, "Scribner and Atheneum had some marvelous assets. Individual parts, folded into Macmillan, were worth a great deal. The children's books gained through the acquisition in effect doubled Macmillan's juvenile sales; the paperback line of classics by Hemingway, Fitzgerald and the like were absorbed into Collier; the Scribner college department was absorbed into the Macmillan equivalent, as were some of the reference books. What was left was the highest-risk publishing—the frontlist at Scribner and Atheneum. It would have taken at least three years and considerable investment for that side of the business to prosper again." Once the more digestible parts of Scribner and Atheneum had been sandwiched into the big Mac, given the history of the previous few years and the risk of investment in trade publishing, it is not so very surprising that the brakes were finally applied to the adult hardcover sector.

The second installment, to appear next week, analyzes the moves and changes that take place soon after a merger by focusing on recent takeovers, i.e., Simon & Schuster/Prentice Hall, Bertelsmann/Doubleday and Penguin/NAL, as well as the changes at Random House. ☐

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Children's Books for Fall

Authors and Editors Speak Out on Censorship • William Steig at 80

YA Covers: Designing for Different Markets • New Life for Backlist Titles

Foreign-Language Books for Children • Index to June Forecasts

Publishers Weekly

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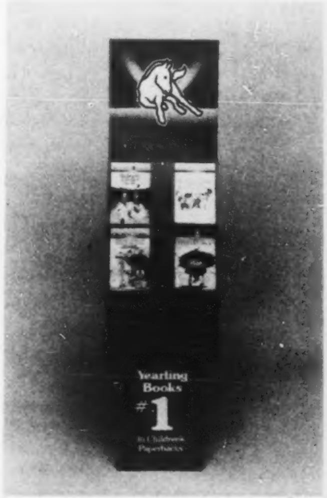

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AAP Sales Report for May

Category	% change, May	% change, YTD
Adult hardcover	13.2	14.1
Adult paperback	4.4	19.7
Juvenile hardcover	22.0	20.0
Juvenile paperback	-1.6	19.7
Univ. pr. hardcover	19.4	8.5
Univ. pr. paperback	38.3	25.0
Bibles, etc.	15.8	7.0
Mass market paperback	15.9	0.2
Book club	9.4	11.8
Mail order	0.8	1.4
Sci-tech	3.3	12.9
College texts	18.7	6.6
School texts	-9.1	-1.1

"Although some publishers have asked to acquire British and translation rights at the same time they acquire U.S. rights, agents feel that we can usually do a better job. A publisher may offer $30,000–$40,000 for U.S. and Canadian rights and then offer perhaps $50,000 for world rights. That's why we prefer to hold onto the rights."

Borchardt felt that there are great opportunities in the international marketplace. American books are greatly in demand abroad—with the exception of the U.K., he said. He singled out Italy, France, Germany and Spain, adding, "we have even sold rights recently to the U.S.S.R."

Borchardt foresees trouble ahead in the one market U.S. publishers already have tapped into—Canada—if U.S. publishers don't begin sublicensing Canadian publication rights to Canadian publishers, instead of relying on distribution arrangements.

International Selling

Robert Hyde, director of international publishing for Little, Brown, predicted growing sales opportunities in a world English-language market, since, he said, this is the area where publishing mergers will have the greatest impact.

It will be important, he continued, to own the means of local distribution in every significant market, to sell products in a fashion unique to each market segment and to take full profits—or losses—on the books rather than offsetting the risk by a licensing arrangement.

Hyde sees agents selling more world rights because conglomerates are not going to invest heavily in a book on one side of the Atlantic only to see rights sold to a rival on the other side. He also sees major authors going to multinationals and the midlist authors going to smaller houses, where they will receive more attention. This latter trend is already in evidence, he said.

Paul Feffer, chairman of Feffer & Simons, on the other hand, said that marketing the same book to countries that share a common language but have different cultures is a risky undertaking. Selling the same edition in various languages is even more perilous. Independent companies targeted to particular nations do better at this than conglomerates, he said.

He predicted that wholesalers will become increasingly important because small booksellers can't afford the inventory and expenses of a chain. Future bestsellers, Feffer said, will be the result of a lot of independent bookstores selling a few copies each.

—DAISY MARYLES
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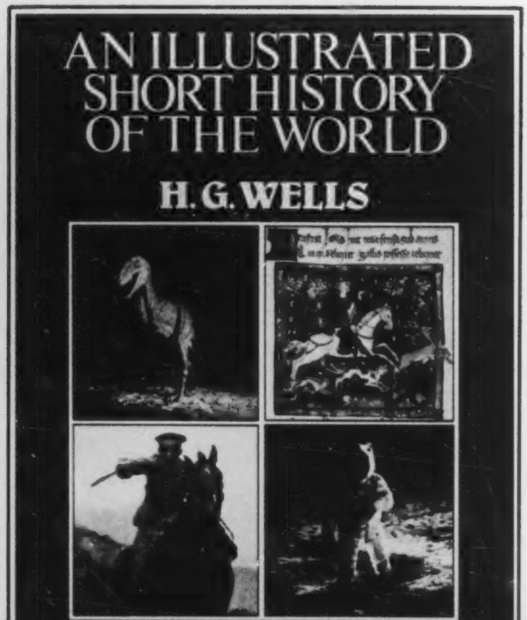
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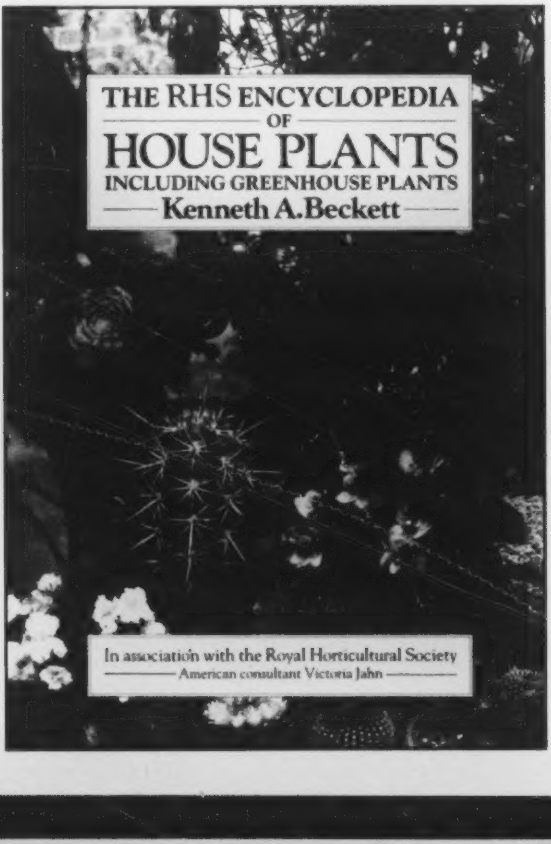
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THE DESSAUER REPORT

BY JOHN P. DESSAUER

First Quarter Sales: Vigorous

Given the sluggish ending of 1986, the book industry's strong performance, as reflected in AAP monthly sales reports for the first quarter of 1987, which serve as the principal source for these estimates, is most reassuring. It also represents, as it has so often in the past, a departure from the general economic pattern, where signs of the possible return of stagflation have begun to worry some economists.

Nearly all categories and market sectors benefited from the sales surge, with mass market paperbacks constituting a notable exception. It is useful to recall that neither 1986, a generally unspectacular year, nor 1985, which was at best fair, began with the promise of 1987. Experience has demonstrated, however, that first-quarter performance does not necessarily provide the definitive clue to results for the entire year.

The data in the accompanying tables are derived from the *Book Industry Trends* database maintained for the Book Industry Study Group by the Center for Book Research at the University of Scranton. Readers are referred to the forthcoming *Book Industry Trends 1987* for definitions and information on the methodology employed in the compilation of these estimates.

TABLE 1

ESTIMATED PUBLISHERS' NET BOOK SALES—FIRST QUARTER 1987

(Millions of Dollars and Units)

	Jan.–Mar. 1987		Jan.–Mar. 1986		Percent Change	
	Dollars	Units	Dollars	Units	Dollars	Units
Trade	695.0	150.77	590.6	140.34	17.7	7.4
Adult Hardbound	363.1	55.91	311.9	51.63	16.4	8.3
Adult Paperbound	204.8	49.04	172.5	45.04	18.7	8.9
Juvenile Hardbound	90.1	24.22	74.4	21.71	21.2	11.6
Juvenile Paperbound	37.0	21.60	31.8	21.96	16.4	(1.6)
Religious	167.9	32.11	157.3	32.89	6.7	(2.4)
Hardbound	119.0	13.92	111.0	14.33	7.2	(2.9)
Paperbound	48.8	18.20	46.3	18.56	5.5	(2.0)
Professional	666.6	46.91	560.0	39.58	19.0	18.5
Hardbound	433.2	15.06	372.2	13.68	16.4	10.1
Paperbound	233.4	31.85	187.7	25.90	24.3	23.0
Book Club	154.3	26.41	135.3	25.39	14.1	4.0
Hardbound	129.5	10.73	112.4	10.14	15.2	5.8
Paperbound	24.9	15.69	22.9	15.25	8.7	2.9
Mail Order Publications	165.4	29.05	158.4	30.00	4.4	(3.2)
Mass Market Paperbacks	229.9	147.35	235.8	143.75	(2.5)	2.5
University Presses	26.5	2.44	25.4	2.44	4.3	0.1
Hardbound	19.5	1.02	19.2	1.09	1.8	(5.9)
Paperbound	7.0	1.42	6.2	1.35	12.2	4.9
Elhi Text	132.0	20.49	123.4	20.39	7.0	0.5
Hardbound	75.3	7.11	70.1	7.09	7.4	0.3
Paperbound	56.6	13.38	53.2	13.30	6.4	0.6
College Text	203.4	16.34	179.9	15.29	13.1	6.9
Hardbound	172.3	11.20	151.6	10.37	13.7	8.1
Paperbound	31.0	5.14	28.3	4.93	9.6	4.3
Subscription Ref.	48.0	0.12	48.6	0.13	(1.2)	(6.7)
Total	**2,488.8**	**472.00**	**2,214.5**	**450.22**	**12.4**	**4.8**

TABLE 2

ESTIMATED DOMESTIC CONSUMER EXPENDITURES ON BOOKS—FIRST QUARTER 1987

(Millions of Dollars and Units)

	Jan.–Mar. 1987		Jan.–Mar. 1986		Percent Change	
	Dollars	Units	Dollars	Units	Dollars	Units
General Retailers	1,409.3	221.42	1,212.9	206.80	16.2	7.1
College Stores	1,029.7	95.25	947.2	95.01	8.7	0.3
Libraries & Institutions	345.8	24.48	312.1	23.83	10.8	2.7
Schools	255.5	40.08	235.9	39.09	8.3	2.5
Direct to Consumer	522.2	67.69	472.2	64.03	10.6	5.7
Other	101.4	42.98	88.4	40.94	14.7	5.0
Total	**3,663.9**	**491.91**	**3,268.7**	**469.70**	**12.1**	**4.7**

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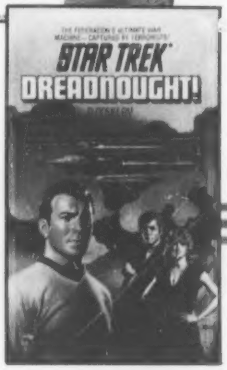

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Masson Loses Libel Suit Against 'New Yorker,' Malcolm and Knopf

Former Freud Archives director and author Jeffrey Moussaieff Masson lost his $10.2 million libel suit against the *New Yorker*, Janet Malcolm and Alfred A. Knopf when a federal judge in San Francisco ruled in favor of the defendants on August 17.

The magazine's December 1983 series of articles (later published by Knopf as *In the Freud Archives*) portrayed Masson as a "grandiose egotist and full of braggadocio." In a 27-page opinion, U.S. District Court Judge Eugene Lynch called these characterizations "either nondefamatory, substantially true or a rational interpretation of ambiguous conversations."

Lynch rejected eight claims alleging defamation against the defendants. Masson charged that Malcolm had misquoted and maligned him to the extent that he was publicly ridiculed and humiliated.

Charles W. Kenady, the *New Yorker*'s attorney in San Francisco, commented that the ruling "means there weren't any factual problems with the story."

Masson, who lives in Berkeley, Calif., and his attorney, Charles O. Morgan Jr., of San Francisco, said that they would appeal the decision.

Last summer Judge Lynch rejected four other libel claims in the same lawsuit. Morgan commented: "The decision didn't come as any great surprise to us. The judge had a negative attitude toward this case."

In *In the Freud Archives* Malcolm described how Masson, a former Sanskrit scholar, quickly rose to prominence in the field of psychoanalysis, eventually becoming director of the Freud Archives in London, which consists mainly of Sigmund Freud's letters.

But after a year heading the archives, he was fired and fell out of favor among psychoanalysts in large part because he claimed to have found evidence that Freud espoused a theory that women usually fantasized childhood sexual abuse while Freud knew that reports of child abuse against his patients were true. Masson claimed that Freud took the public stance in order to win support from his colleagues.

Masson, a lay psychoanalyst, chronicled his controversial findings in *The Assault on Truth: Freud's Suppression of the Seduction Theory*, published by Farrar, Straus & Giroux.

Among the disputed sections of Malcolm's writing was one in which she quotes Masson describing himself as an "intellectual gigolo—you get your pleasure from him, but you don't take him out in public." Masson claimed he never made the statement.

That statement was not on any of the 26 tape cassettes submitted in evidence by Malcolm, but Judge Lynch ruled that it was a "rational interpretation" of Masson's comments and that it was supported by related statements on the tape that were also quoted verbatim in the article.

Commenting to *PW* about this issue, Masson said, "What Malcolm is saying is that she has read my unconscious and put quotes around my unconscious. That's not journalism, it's fiction or psychoanalysis." —MOLLY COLIN

AAP Sales Report for June

Category	% change, June	% change, YTD
Adult hardcover	-15.4	9.6
Adult paperback	2.2	17.2
Juvenile hardcover	28.5	21.3
Juvenile paperback	113.6	29.7
Univ. Pr. hardcover	1.3	6.0
Univ. Pr. paperback	8.4	29.4
Bibles, etc.	5.6	6.8
Mass market paperback	28.9	5.5
Book club	9.5	11.2
Mail order	1.1	1.2
Sci-tech	3.9	9.5
College texts	0.4	4.5
School texts	18.8	7.1

HBJ Has $70 Million Quarterly Loss, Plans to Sell Magazine Unit

In the first bottom-line indication of the cost of its successful repulsion of British publisher Robert Maxwell's takeover bid earlier this year, Harcourt Brace Jovanovich has announced that it suffered a net loss of $70.8 million in the second quarter.

In a related announcement, the company stated that it would sell its magazine unit to help reduce the amount of its debt, which jumped to more than $2.5 billion from $816.2 million as a result of the company's method of defending itself from Maxwell.

The magazine unit, called HBJ Publications, publishes special interest and trade magazines and is estimated to be worth up to $400 million. Its 107 magazines include *Beverage Industry*, *Physician's Management* and *Hotel and Motel Management*.

The quarterly loss, which came on sales and revenues of $408.7 million, was attributed in large part to a charge to income of $98,947,000 "of expenses relating to the recapitalization plan." The plan, the cornerstone of the company's takeover defense, included the offering to shareholders of $40 in cash and a new issue of preferred stock in exchange for 30 million shares outstanding as well as the buying back of up to six million of its own shares.

The company also noted an "extraordinary charge to income of $11,166,000 (net of taxes) from the open market repurchase and subsequent retirement of $18,815,000 of 6⅜% Convertible Subordinated Debentures." In addition, the company took a pretax charge of slightly more than $15 million for the relocation of HBJ insurance operations to Orlando, Fla., from Battle Creek, Mich.

HBJ's sales and revenues rose 31% in the quarter and 35% in the six-month period. Publishing sales and revenues rose 29% to $221.1 million in the second quarter and 36% to $392.7 million in the six-month period. Publishing operating income dropped 73% to $3.6 million in the quarter and the operating loss for the six-month period grew to $29.2 million.

Harcourt Brace Jovanovich

Three Months Ended June 30

	1987	1986
Sales	$408,699,000	$312,008,000
Income	(70,756,000)	10,916,000

Six Months Ended June 30

	1987	1986
Sales	$739,994,000	$547,043,000
Income	(98,452,000)	3,451,000

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Writers and Readers: A Publisher That Breaks Down Ba
Illustrated Gift Books for Xmas • A Busy Summer for Copyright
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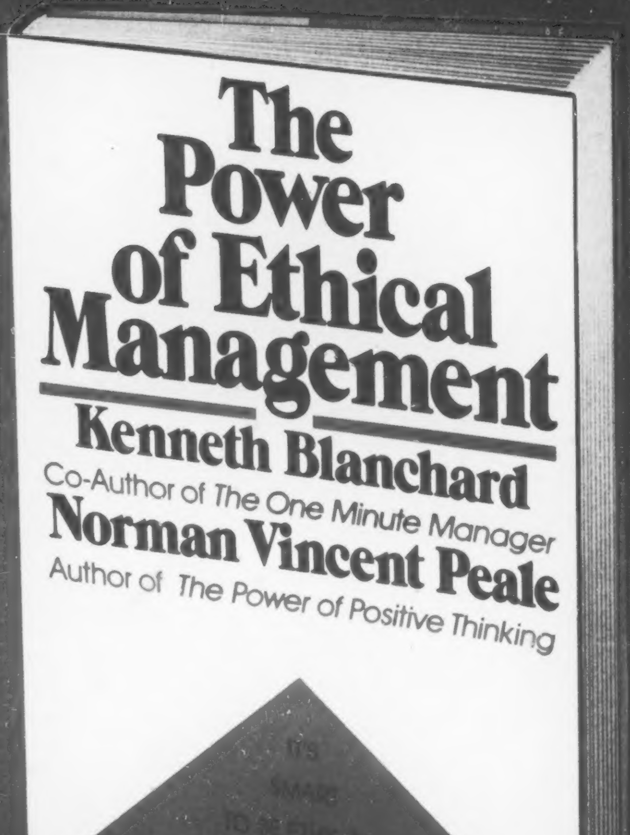
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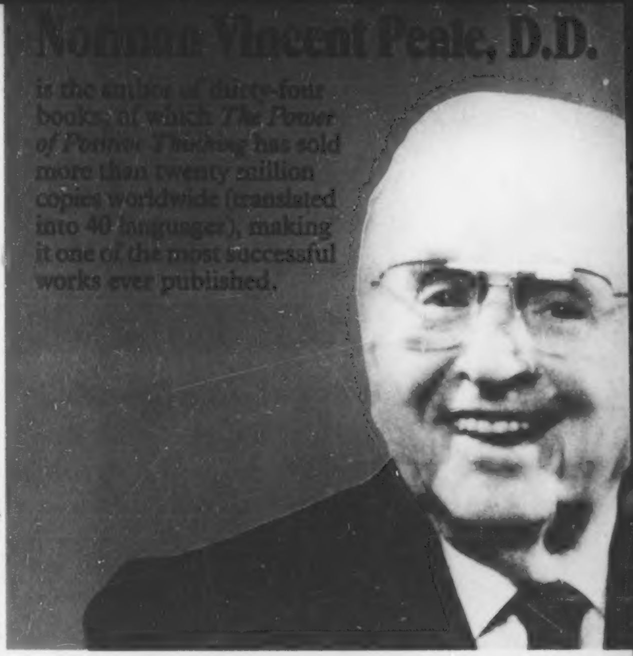

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Catherine & Jon Riley, 1987

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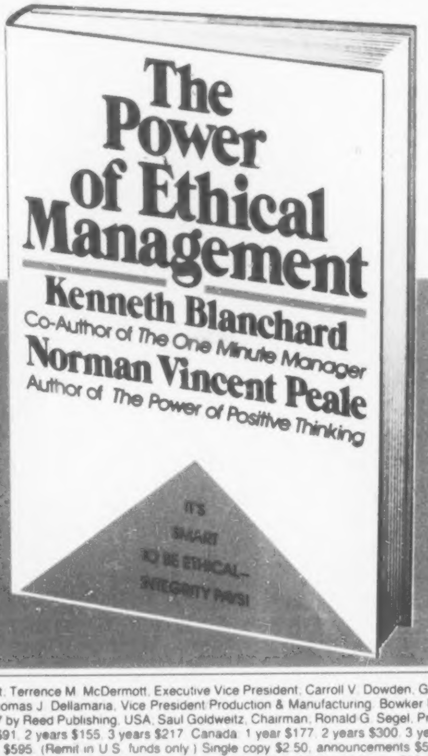
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THE GALLUP SURVEY

LEONARD WOOD

Book Buying Up Among Younger Readers

During the first six months of 1987, one in five adults made a recent book purchase. Questioned between January and June, 21% of Americans claimed to have bought a book within the past seven days—a proportion nearly identical to that found during the same six month interval in 1985 (19%) and 1986 (21%).

But there has been some change over the three-year period among the age groups most likely to buy a book. The first half of 1985 saw one in five 18–24-year-olds (19%) buying a book in the past seven days, but the age group most likely to have made a purchase was the 35–49-year-olds. By 1987, however, the proportion of young people who reported book purchases increased by five percentage points, so that one in four 18–24-year-olds (24%) bought a book. There was also a slight increase in book buying by 25–34-year-olds (+2 percentage points). Adults age 50 and older, however, continued to be less likely than younger people to buy books.

Not only have young people increased their incidence of book buying since 1985; they have also increased the number of books they buy. Among book buyers in 1985, 18–24-year-olds reported buying an average of 2.1 books in the past week, the smallest amount of any age group. This figure increased to 2.6 in 1987, while the average number of books bought by those age 50 and older decreased to 2.3, thereby reversing 1985's pattern. Young adults also paid more for their books than did older people. Paperbacks purchased by 18–24-year-olds cost an average of $7.20, compared to under $6 for the softcovers bought by older people. Similarly, young people's hardcovers averaged $24.60, almost $10 more than the approximately $15 paid by older adults.

NOTE: *Results are based on telephone interviews conducted among a nationally representative sample of 6108 adults, age 18 and older, from January–June, 1987.*

TABLE 1

PURCHASED ANY BOOKS IN PAST 7-DAYS

	Jan.-June 1985	Jan.-June 1986	Jan.June 1987	Chg. % pts. 1985–1986
	%	%	%	
Total Adults	19	21	21	+2
Age				
18–24 years	19	24	24	+5
25–34 years	22	23	24	+2
35–49 years	25	25	25	+0
50 and over	14	14	16	+2

TABLE 2

AVERAGE NUMBER OF BOOKS PURCHASED

	Jan.-June 1985	Jan.-June 1986	Jan.June 1987
Total Book Buyers	2.4	2.4	2.5
Age			
18–24 years	2.1	2.2	2.6
25–34 years	2.2	2.3	2.6
35–49 years	2.5	2.6	2.5
50 and over	2.6	2.5	2.3

TABLE 3

AVERAGE PRICE PAID

	January-June 1987	
	Paperback	Hardback
Total Book Buyers	5.80	16.50
Age		
18–24 years	7.20	24.60
25–34 years	5.40	15.20
35–49 years	5.70	15.10
50 and over	5.60	14.50

The Frankfurt Book Fair Issue

The Books & People World Publishers Are Taking
Publishing Cities: Munich, Germany's Publishing Capital

C1650-2
9/21/87

Publishers Weekly

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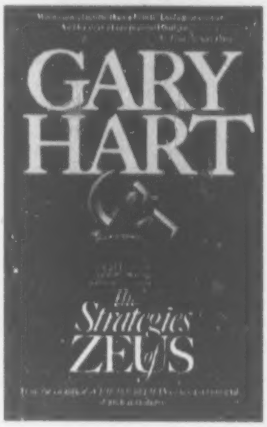

MARCH **The Strategies of Zeus** by none other than Gary Hart, the much publicized former U.S. presidential candidate. Set during arms negotiations in 1987 and 1988, Hart's novel follows the intrigues of cliques in both Washington and Moscow that are trying to sabotage the talks and accelerate the space arms race. $4.50.

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U.S. Exports, Imports, UNESCO Reports: 1986 Figures

BY CHANDLER B. GRANNIS

With recorded U.S. book exports of $604 million against imports of over $701 million, the year 1986 was the first in several generations to show an unfavorable international balance of trade for American book publishers, according to the U.S. Department of Commerce. The ratio of exports to imports in 1986 was 46 to 54; in 1982 it had been 67 to 23.

During the first five months of 1987, however, import and export figures have both turned upward—to the point, in fact, where exports exceeded imports slightly. "By the end of the year, there still may be a negative balance, but the gap should be narrowed," William S. Lofquist, book-and-periodicals specialist at the department's International Trade Administration, suggested in a telephone interview with *PW*.

Export sales totals were dropping year by year in the days of "the strong dollar" and, in 1985, were 8.9% below 1984, while imports increased by 14.8%. In 1986, exports increased slightly—by 2.2%—but imports zoomed by 14.3%. By the end of this year, Lofquist feels, the figures should come closer together if current trends prevail.

The two factors now affecting the trends, Lofquist points out, are possibly in conflict: the continuing fall in the value of the dollar in relation to other currencies, which encourages U.S. sales abroad, and the demise of the manufacturing clause in the U.S. copyright law, which removes the threat of copyright loss for U.S.-published books manufactured in other countries. (The possible effects of the manufacturing clause change—which may or may not prove important—were thoroughly examined by Jerome P. Frank in *PW*, July 3.)

The first four tables with this article, A through D, have been constructed from data supplied by Lofquist in the form of raw printouts. Table A, exports, shows shipments valued over $500; Table B, imports, reports shipments valued over $250. Totals for the shipments of lower value can only be a matter of speculation.

From the same printouts, *PW* has extracted figures on exports to principal markets, by country (Table C). Imports from principal sources, by country, are given in Table D. The latter includes books produced abroad for publishers in the U.S.

Table E, book-title output by principal countries, is compiled by

TABLE A

1985–1986 U.S. BOOK EXPORTS
Shipments Valued over $500

	$ 1985	$ 1986	% CHG.	1985 UNITS	1986 UNITS	% CHG.
Bibles, Testaments & Other Religious Books (2703020)	$ $30,229,735	$33,874,307	+12.1	39,266,888	46,275,876	+17.8
Dictionaries & Thesauruses (2703040)	4,284,676	4,725,970	+10.3	694,651	742,196	+6.8
Encyclopedias (2703060)	26,888,675	32,356,436	+20.3	4,953,897	5,536,458	+11.8
Textbooks, Workbooks & Standardized Tests (2703070)	107,413,027	112,377,028	+4.6	17,774,326	16,347.662	-8.6
Technical, Scientific & Professional Books (2703080)	140,460,968	156,555,078	+11.5	29,149,797	29,857,731	+2.4
Paperbound Mass Market Books (2704020)	46,567,173	40,898,773	-12.2	36,565,112	33,299,603	-8.9
Books Not Specially Provided for (2704040)	220,935,095	210,787,351	-4.6	89,167,869	87,205,160	-2.0
Children's Picture & Coloring Books (7375200)	9,323,953	7,555,664	-19.0	–	–	–
TOTAL EXPORTS	**$591,166,181**	**$604,033,069**	+2.2	–	–	–

SOURCE for Tables A, B and C: Department of Commerce; compiled by the writer from printouts supplied by William S. Lofquist, Industry Specialist (Printing and Publishing), International Trade Administration

PW from one of the many tabulations in the annual *UNESCO Statistical Yearbook*, except the U.S. figures, which are derived by Bowker data services.

For some years, the U.S. title figures were augmented by annual totals of U.S. Government Printing Office book output and a count of university theses; these reports are not now available. It should be noted, however, that the U.S. figures given here do include the books of all American university presses.

TABLE B

1985–1986 U.S. BOOK IMPORTS

Shipments Valued over $250

	$ 1985	$ 1986	% CHG.	1985 UNITS	1986 UNITS	% CHG.
Bibles, Prayerbooks (270520)	$9,781,475	$15,038,156	+53.7	8,840,492	12,859,531	+45.5
Books, Foreign Language (2702540)	33,483,433	37,738,941	+12.7	24,016,684	22,114,817	+7.9
Books, Not Specially Provided for, wholly or in part the work of an author who is a U.S. domiciliary (2702560)	16,036,054	26,128,615	+62.9	56,219,149	57,982,639	+3.1
Other Books (2702580)	491,852,127	607,969,899	+23.6	450,116,467	510,550,155	+13.4
Children's Picture & Coloring Books (7375200)	13,006,731	14,567,999	+12.0	–	–	–
TOTAL IMPORTS	$564,159,820	$701,438,610	+24.3	–	–	–

TABLE C

1985–1986 U.S. BOOK EXPORTS

Shipments Valued over $500

	$ 1985	$ 1986	% CHG.
Canada	$240,348,325	206,273,780	-14.2
United Kingdom	67,648,757	79,067,346	+16.9
Australia	57,732,102	56,945,259	-1.4
Japan	34,803,278	34,827,058	+0.6
Netherlands	21,793,469	22,177,779	+1.8
China (PRC)	5,578,657	17,505,469	+213.8
Mexico	12,347,720	15,799,004	+28.0
W. Germany	13,696,873	14,467,329	+5.6
Venezuela	4,647,802	10,665,545	+129.5
Singapore	10,689,036	10,477,379	-2.0
India	9,916,504	10,106,052	+1.9
France	7,993,249	9,913,069	+24.0
Brazil	3,580,660	9,702,609	+171.0
Philippine Rep.	4,540,179	9,624,891	+112.0
Ireland	8,597,071	7,345,706	-14.6
South Africa Rep.	7,266,164	6,860,293	-5.6
Hong Kong	5,077,053	5,550,831	+9.3
Switzerland	4,571,590	4,899,615	+7.2
New Zealand	4,430,987	4,523,415	+2.1
Italy	4,620,411	4,122,343	-10.8
***TOTAL**	$591,166,181	$604,033,069	+2.2

*Includes figures for the countries not specifically listed here

TABLE D

1985–1986 U.S. BOOK IMPORTS

Shipments Valued over $250

	$ 1985	$ 1986	% CHG.
United Kingdom	$130,930,198	$175,113,256	+33.7
Japan	94,340,686	125,925,445	+33.5
Canada	87,398,155	104,293,065	+19.3
Hong Kong	36,445,299	54,284,854	+48.9
Italy	50,383,024	47,908,722	-4.9
W. Germany	25,547,406	35,037,710	+37.1
Belgium	12,009,476	18,160,365	+51.2
Netherlands	10,581,900	12,760,656	+20.6
Singapore	12,308,701	15,953,384	+29.6
France	9,335,737	12,362,195	+32.4
Switzerland	6,687,723	10,344,613	+54.7
Mexico	7,030,761	8,942,945	+27.2
China,Taiwan	7,377,550	6,289,152	-14.8
Rep. Korea	4,846,738	7,880,650	+62.6
Israel	4,598,969	4,433,522	-3.6
Colombia	3,956,340	4,164,470	+5.3
***TOTAL**	$564,159,820	$701,438,619	+24.3

*Includes figures for the countries not specifically listed here

TABLE E

1982–1984 TITLE OUTPUT

	1982	1983	1984
Africa			
Nigeria	1,686	1,495	1,836
North America			
Canada	No reports given		
Cuba	1,640	1,817	2,069
Mexico	2,818	–	4,505
* United States	46,930	53,380	51,058
South America			
Argentina	4,962	4,216	–
Brazil	19,179	–	–
Chile	–	1,326	1,653
Colombia	–	7,671	15,041
Uruguay	899	1,217	1,206
Asia			
China, People's Rep.	–	31,602	34,920
Hong Kong	3,560	5,681	–
India	10,649	–	9,954
Indonesia	5,488	5,731	5,254
Iran	2,994	4,835	–
Israel	1,892	–	–
Japan	42,977	44,253	–
Korea, Rep.	30,436	35,512	35,446
Malaysia	2,801	3,534	3,975
Singapore	1,530	1,327	–
Sri Lanka	1,951	–	–
Thailand	5,645	6,819	6,633
Turkey	6,440	6,819	–
Europe			
Albania	1,149	997	1,130
Austria	6,736	–	9,059
Belgium	8,041	8,065	–
Bulgaria	5,070	4,924	5,367
Czechoslovakia	10,519	9,574	9,911
Denmark	10,189	9,460	10,660
Finland	7,436	8,594	8,563
France	42,106	37,576	37,189
E. Germany	5,938	6,175	6,175
W. Germany	58,592	58,489	48,836
Hungary	8,836	8,469	10,421
Italy	12,926	13,718	14,312
Netherlands	13,324	–	13,209
Norway	5,175	5,540	–
Poland	9,814	8,789	9,195
Portugal	9,139	8,647	9,041
Romania	6,702	5,771	5,632
Spain	32,138	32,457	30,764
Sweden	8,509	8,036	10,373
Switzerland	11,405	11,355	11,806
United Kingdom	48,029	50,981	51,411
Yugoslavia	10,535	10,931	10,918
Oceania			
Australia	8,373	3,294	–
New Zealand	–	2,944	3,452
U.S.S.R.			
U.S.S.R. totals	80,674	82,589	82,790
Byelorussia	2,923	3,264	3,264
Ukraine	8,239	8,882	8,403

SOURCE: UNESCO Statistical Yearbook, 1986, Table 7.7, except U.S. figures, supplied by R.R. Bowker Co. data services.

* Not included in U.S. figures are publications of state and local governments, some institutions, company reports, proceedings, lab manuals, yearbooks, U.S. Government Printing Office publications and university theses. However, the books of university presses, religious denominations and other nonprofit publishers are included.

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Publishers Weekly

A CAHNERS/R.R. BOWKER PUBLICATION THE INTERNATIONAL NEWS MAGAZINE OF BOOK PUBLISHING OCTOBER 2, 1987 $2.50

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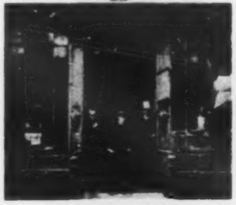

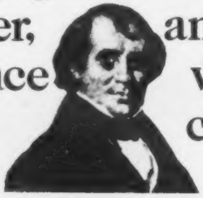

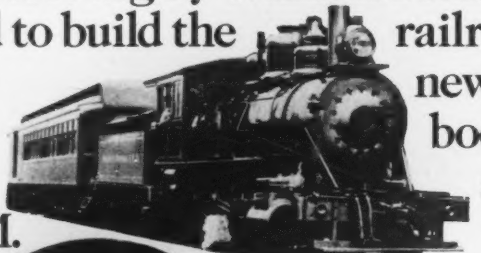

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Thomson to Sell General Publishing Units of ABP Conglomerate

As had been expected, the International Thomson Organisation is selling off parts of its newly acquired subsidiary, the British conglomerate Associated Book Publishers. The divestment covers ABP's general division and the general lists of three of the group's overseas companies. The move seems logical, in that ITO in March 1985 sold its general publishing houses—Hamish Hamilton, Michael Joseph, Rainbird and Sphere—to the Penguin group and stated its aim of concentrating on specialist and professional publishing.

The U.K. general division of ABP is made up of Eyre & Spottiswoode, Methuen Children's Books, Methuen London and Pitkin Pictorials. The oldest of these houses, Eyre & Spottiswoode, which specializes in bibles, *The Book of Common Prayer* and religious titles, dates back to 1796, when Charles Eyre was granted a royal patent, still held by the firm, to publish the Authorized Version of the Bible. The youngest member is Pitkin Pictorials, specializing in inexpensive illustrated titles on Britain's heritage, especially the monarchy; started up in 1972, it was acquired by ABP last year. The well-respected Methuen name borne by the two major houses within this division dates back to 1889.

Methuen London has a particularly strong drama list, which is closely linked to the performing theater, and is famous for its humor titles, which include Monty Python, Thelwell and Sue Townsend's phenomenal Adrian Mole books, which have sold well over five million copies worldwide. The fiction backlist has John Braine, Christopher Isherwood and Evelyn Waugh, while current authors include Leslie Thomas and Maureen Duffy. Methuen Children's Books publishes one of the longest British children's lists, with authors of the caliber of Dick Bruna and Tomie dePaola.

The general lists represent only small portions of the Canadian and Australian companies, the solid foundation of whose business is law publishing. Methuen Inc. in the United States, now concentrating solely on academic and STM publishing, is not affected by the divestments. However Reed Methuen, New Zealand's largest domestic publisher, has a strong general list.

One aspect of the breakup that has caused particular concern in many quarters is the virtual certainty that the academic company Methuen & Co., which is to remain with ITO, will lose its name—and presumably its identity—since it is expected that any buyer of the general Methuen houses will want to keep the name. There is an added complication in the fact that Routledge & Kegan Paul, acquired by ABP in 1985 (the year before it celebrated its 150th anniversary), is not a purely academic publisher, though it currently forms part of the ABP Academic Division. It seems likely that in the long term ITO will not want to keep imprints such as the feminist Pandora, started in 1983.

It seems probable that the sale will be completed fairly quickly, as speculation that such a divestment was imminent had given potential bidders for the U.K. division a chance to size up the situation. Michael Turner, ABP's chief executive, stressing that the intention was to sell the Methuen adult and children's companies together, told *PW* that a number of approaches had already been made.

Although Turner could not reveal names (he did acknowledge, however, that the interested parties included American companies) the trade believes that the most likely British contenders are Collins, Penguin, Random House's recent U.K. acquisitions Cape, Chatto and the Bodley Head, and Transworld, Bertelsmann's U.K. subsidiary, which has publicly expressed its interest. Other possibles are Simon & Schuster's U.K. company and Hodder.

Yet another possibility is a management buyout, currently being attempted by Methuen London managing director Geoffrey Strachan and three colleagues.

Speaking of the sale of ABP's overseas interests, CEO Turner commented: "We would very much hope that we can do a deal involving the transfer of the whole of the international general business to a single buyer."

ABP is also divesting itself of its bookselling arm: the Hammicks retail and wholesaling business, which had a £12.5 million turnover in 1987 (up 27.6% over the previous year).

—V.M.

AAP Sales Report for July

Category	% change, July	% change, YTD
Adult hardcover	-4.0	9.7
Adult paperback	0.5	15.6
Juvenile hardcover	32.5	25.2
Juvenile paperback	29.7	28.7
Univ. Pr. hardcover	9.0	5.4
Univ. Pr. paperback	0.5	13.7
Bibles, etc.	12.7	2.2
Mass market paperback	53.8	12.7
Book club	16.0	13.7
Mail order	16.8	3.2
Sci-tech	-2.2	15.3
College texts	-2.6	0.5
School texts	6.0	7.2

OBITUARY NOTES

Lisa Gordon, known professionally as Lisa Fillman, who was formerly deputy director of publicity in the trade division of Harper & Row, died September 8 after a long illness. She was 57.

She joined the publicity department in 1971 after a long career in broadcasting and on the stage, and retired in February of this year. Among the writers for whom she handled publicity were Colleen McCullough, Barbara Gordon, Doris Kearns, Dick Francis, Theodore White, Annie Dillard, Erich Segal, Diana Kennedy and Roger Kahn.

Andrew Stewart, former president of Denhard & Stewart and a pioneer in book advertising, died September 9 at his home in Manhattan. Stewart, who had been suffering from lung cancer, was 79.

Beginning his career in journalism and public relations, Stewart joined the agency that became Denhard & Stewart in 1935 as a copywriter and layout artist. After service in World War II, he returned to the agency as general manager, responsible for the firm's creative work. In 1956, he bought out Charles Denhard, a founder of the agency, and became president. A friend of Alfred A. Knopf, Cass Canfield and other early giants in the book industry, Stewart retired in 1973.

Brian Sumrall, veteran publishers' representative, died August 28 in Tomball, Tex., of a stroke suffered 10 days previously.

He had worked for Books Inc., of Houston for eight years and as a sales representative for Avon for five years. For the past three years he had been associated with Palmer Associates.

An art scholarship will be established in his name at his alma mater, Lamar University in Beaumont, Tex. Contributions may be sent to the Brian Sumrall Memorial Scholarship Fund, c/o Theron Palmer, 1503 W. 29th St., Austin, Tex. 78703.

U.S. Book Title Output and Average Prices, Final 1986 Figures

BY CHANDLER B. GRANNIS

Almost 53,000 books, both brand new titles and new editions, were published in the United States in 1986, according to final figures compiled from R. R. Bowker databases. The total, including all books of all kinds for which information is available, is 733 titles below the peak all-time figure of 53,380, recorded in 1983.

About 33,000 of the 1986 output consist of hardcover books; almost 16,000 comprise "trade" or non-mass market paperbacks; and the rest are mass market.

The overall average price of hardcover books on a per-volume basis rose 3% from 1985 to 1986, with hardcover books priced under $81 per volume going up about 2.1%. Mass market paperback prices went up an average of 9% per volume, and paperbacks other than mass market showed a 5.9% increase.

Tables 1–4 show title counts of entries in Bowker's *American Book Publishing Record* system. Table 5 is taken from entries in the Bowker *Paperbound Books in Print*.

Table 1 sums up the title counts: the first two columns show brand-new titles and new or revised editions of hardcover and trade paperbound books combined; the third column shows the total of those two; the fourth column shows overall totals with the inclusion of mass market paperbacks. Table 2 enumerates the mass market paperbacks, but no separation between new books and new or revised editions is available for these books.

Table 3 shows other paperbacks without subject breakdown. Table 4 indicates the trend of imports, and Table 5 gives at least a partial view of translations into English.

Tables A through C show average prices per volume. Table A gives overall hardcover price averages; Table A–1 covers hardcover volumes priced under $81. Table B gives mass market prices, and Table C reports other paperback prices.

Each of the 23 standard subject groups used here represent one or more specific Dewey Decimal Classifications, as follows: Agriculture, 630–639, 712–719; Art, 700–711, 720–779; Biography (no Dewey numbers used); Business,

TABLE 1

AMERICAN BOOK TITLE PRODUCTION

CATEGORY	1984 ALL HARD & PAPER	1985 HARD & TRADE PAPER Books	Editions	Totals	ALL HARD & PAPER	1986 FINAL HARD & TRADE PAPER Books	Editions	Totals	ALL HARD & PAPER
Agriculture	507	450	79	529	536	477	81	558	564
Art	1,838	1,392	150	1,542	1,545	1,504	190	1,694	1,697
Biography	2,098	1,604	270	1,874	1,953	1,805	281	2,086	2,152
Business	1,696	1,142	350	1,492	1,518	1,197	376	1,573	1,604
Education	1,052	885	188	1,073	1,085	866	143	1,009	1,029
Fiction	5,413	2,290	291	2,581	5,105	2,687	467	3,154	5,578
General Works	3,021	2,549	270	2,819	2,905	2,144	279	2,423	2,484
History	2,257	1,913	383	2,296	2,327	2,015	423	2,438	2,471
Home Economics	1,306	999	128	1,127	1,228	900	106	1,006	1,103
Juveniles	3,128	3,183	191	3,374	3,801	3,849	206	4,055	4,516
Language	670	519	99	618	632	528	123	651	668
Law	1,406	1,036	307	1,343	1,349	1,018	363	1,381	1,385
Literature	2,006	1,669	260	1,929	1,964	1,788	322	2,110	2,145
Medicine	3,554	2,925	618	3,543	3,579	2,845	557	3,402	3,445
Music	387	277	78	355	364	270	76	346	356
Philosophy, Psychology	1,554	1,220	227	1,447	1,559	1,323	264	1,587	1,669
Poetry, Drama	1,164	1,075	75	1,150	1,166	1,180	71	1,251	1,278
Religion	2,482	2,211	329	2,540	2,564	2,464	299	2,763	2,788
Science	3,236	2,808	481	3,289	3,304	2,782	564	3,346	3,360
Sociology, Economics	7,794	6,285	1,112	7,397	7,441	6,815	1,042	7,857	7,912
Sports, Recreation	1,299	876	129	1,005	1,154	843	189	1,032	1,192
Technology	2,639	2,079	405	2,484	2,526	2,213	449	2,662	2,698
Travel	551	366	90	456	465	412	121	533	543
TOTAL	51,058	39,753	6,510	46,263	50,070	41,925	6,992	48,917	52,637

NOTE: Figures for mass market paperbound book production are based on entries in *Paperbound Books in Print*. Other figures are from the *Weekly Record (American Book Publishing Record)* database. The heading "Books" refers to brand-new titles; "Editions" refers to new or revised editions.

650–659; Education, 370–379; Fiction; General Works, 000–099; History, 900–909, 930–999; Home Economics, 640–649; Juveniles; Language, 400–499; Law, 340–349; Literature 800–810, 813–820, 823–899; Medicine, 610–619; Music, 780–789; Philosophy, Psychology, 100–199; Poetry, Drama, 811, 812, 821, 822; Religion, 200–299; Science, 500–599; Sociology, Economics, 300–339, 350–369, 380–399; Sports, Recreation, 790–799; Technology, 600–609, 620–629, 660-699; Travel, 910–919.

TABLE 2

MASS MARKET PAPERBACKS

CATEGORY	1984 FINAL	1985 FINAL	1986 FINAL
Agriculture	2	7	6
Art	3	3	3
Biography	75	79	76
Business	22	26	31
Education	5	12	20
Fiction	2,663	2,524	2,424
General Works	66	86	61
History	25	31	33
Home Econ.	83	101	97
Juveniles	257	427	461
Language	23	14	17
Law	6	6	4
Literature	57	35	35
Medicine	29	36	43
Music	3	9	10
Philos., Psych.	85	112	82
Poetry, Drama	9	16	27
Religion	14	24	25
Science	53	15	14
Sociol., Econ.	45	44	55
Sports, Recr.	181	149	160
Technology	85	42	36
Travel	12	9	10
TOTAL	3,083	3,807	3,730

TABLE 4

IMPORTED TITLES
HARD & TRADE PAPER ONLY

CATEGORY	1984	1985			1986 FINAL		
	TOTALS	BOOKS	ED'NS	TOTALS	BOOKS	ED'NS	TOTALS
Agriculture	103	101	17	118	117	7	124
Art	61	157	9	166	160	8	168
Biography	240	188	28	216	163	25	188
Business	140	120	26	196	140	19	159
Education	190	207	4	211	212	8	220
Fiction	164	155	16	171	199	48	247
General Works	268	312	17	329	322	24	346
History	324	348	47	395	337	47	384
Home Econ.	41	36	5	41	36	6	42
Juveniles	69	87	5	92	108	4	112
Language	179	200	16	216	212	22	334
Law	158	147	23	170	151	39	190
Literature	238	246	21	267	241	20	261
Medicine	508	531	67	598	607	58	665
Music	54	64	6	70	60	6	66
Philosophy, Psychology	211	257	10	267	243	20	263
Poetry, Drama	174	203	17	220	206	10	216
Religion	160	153	20	173	131	10	141
Science	1,032	1,121	121	1,242	1,061	153	1,214
Sociology, Economics	1,373	1,421	138	1,559	1,491	144	1,635
Sports, Recreation	137	95	12	107	100	10	110
Technology	454	364	55	419	554	64	618
Travel	61	56	5	61	36	10	46
TOTAL	6,339	6,569	685	7,304	6,887	762	7,749

TABLE 3

PAPERBACKS (EXCLUDING MASS MARKET)

CATEGORY	1984	1985			1986 FINAL		
	TOTALS	NEW BOOKS	NEW ED'NS	TOTALS	NEW BOOKS	NEW ED'NS	TOTALS
Fiction	518	365	71	436	353	78	431
Nonfiction	14,649	12,520	2,383	14,903	12,984	2,518	15,502
TOTAL	15,167	12,885	2,454	15,339	13,337	2,596	15,933

TABLE 5

TRANSLATIONS INTO ENGLISH
HARD & TRADE PAPER ONLY

	ARABIC	DANISH	DUTCH	FINNISH	FRENCH	GERMAN	HEBREW	ITALIAN	JAPANESE	LATIN	NORWEGIAN	RUSSIAN	SPANISH	SWEDISH	YIDDISH	OTHER	TOTALS
1984 Final	16	27	38	10	355	425	28	97	64	42	4	181	97	21	10	NA	1,439
1985 Final	8	17	40	5	416	369	29	92	59	30	13	182	86	28	15	NA	1,385
1986 Final	29	26	48	3	485	470	45	110	116	36	9	185	93	26	11	NA	1,762

NOTE: "Total" covers only the languages listed here.

TABLE A

HARDCOVER AVERAGE PER-VOLUME PRICES

CATEGORY	1977	1984		1985		1986 FINAL		
	PRICES	VOLS.	PRICES	VOLS.	PRICES	VOLS.	TOTAL	PRICES
Agriculture	$16.24	359	$34.92	368	$36.77	391	$ 15,348.85	$39.26
Art	21.24	1,114	33.03	908	35.15	996	35,264.05	35.41
Biography	15.34	1,408	22.53	1,298	22.20	1,446	33,196.93	22.96
Business	18.00	1,116	26.01	1,040	28.84	1,115	34,250.18	30.72
Education	12.95	580	24.47	602	27.28	559	14,596.31	26.11
Fiction	10.09	1,989	14.74	1,800	15.29	2,212	37,256.41	16.84
General Works	30.99	1,602	35.61	1,632	37.91	1,151	58,885.08	38.97
History	17.12	1,432	27.53	1,506	27.02	1,598	45,444.58	28.44
Home Economics	11.16	655	15.70	594	17.50	532	10,089.97	18.97
Juveniles	6.65	2,398	10.02	2,529	9.95	3,066	32,608.10	10.64
Language	14.96	410	22.97	347	28.68	351	11,514.52	32.80
Law	25.04	925	43.88	955	41.70	958	47,133.33	49.20
Literature	15.78	1,243	23.57	1,181	24.53	1,359	34,961.50	25.73
Medicine	24.00	2,836	40.65	2,798	44.36	2,643	132,120.09	49.99
Music	20.13	232	27.79	238	28.79	222	7,234.49	32.59
Philosophy, Psychology	14.43	895	29.70	895	28.11	991	29,387.94	29.65
Poetry, Drama	13.63	599	26.75	563	22.14	617	15,492.93	25.11
Religion	12.26	1,118	17.76	1,100	19.31	1,171	25,294.72	21.60
Science	24.88	2,535	46.57	2,556	51.19	2,559	142,411.62	55.65
Sociology, Economics	29.88	5,066	33.35	4,761	33.33	5,043	152,982.93	30.34
Sports, Recreation	12.28	623	20.16	530	23.43	573	13,320.82	23.25
Technology	23.61	1,797	45.80	1,693	50.37	1,904	104,718.75	55.00
Travel	18.44	252	21.31	210	24.66	218	5,301.90	24.32
TOTAL	$19.22	31,184	$29.99	30,104	$31.46	32,035	$1,038,816.00	$32.43

TABLE A-1

HARDCOVER AVERAGE PER-VOLUME PRICES—LESS THAN $81

CATEGORY	1983	1984		1985		1986 FINAL		
	PRICES	VOLS.	PRICES	VOLS.	PRICES	VOLS.	TOTAL	PRICES
Agriculture	$27.76	333	$28.85	337	$29.99	356	$ 11,354.55	$31.89
Art	26.77	1,041	28.90	868	30.05	961	30,092.10	31.63
Biography	19.77	1,393	20.91	1,282	20.81	1,431	31,000.93	21.66
Business	24.02	1,103	24.74	1,024	27.27	1,088	30,938.38	28.44
Education	21.32	576	21.81	598	24.02	556	14,315.31	25.75
Fiction	14.14	1,987	14.49	1,799	15.24	2,197	34,906.41	15.89
General Works	26.12	1,530	26.97	1,561	29.05	1,441	45,903.53	31.86
History	23.85	1,401	23.89	1,487	25.41	1,578	42,667.58	27.04
Home Economics	14.53	654	15.53	591	17.11	528	9,718.72	18.41
Juveniles	9.15	2,394	9.75	2,529	9.95	3,062	32,070.16	10.47
Language	25.26	406	22.96	343	27.61	340	10,282.02	30.24
Law	30.25	854	31.60	888	35.87	863	22,170.73	37.28
Literature	21.31	1,230	21.69	1,169	23.46	1,346	33,146.00	24.63
Medicine	33.02	2,601	33.93	2,505	36.29	2,235	93,449.58	37.34
Music	24.06	240	25.01	236	27.72	217	5,707.98	26.30
Philosophy, Psychology	25.08	880	25.22	886	27.34	980	27,914.94	28.48
Poetry, Drama	19.39	588	19.32	554	20.90	610	13,918.93	22.82
Religion	15.93	1,111	16.30	1,096	18.88	1,162	23,331.27	20.08
Science	36.49	2,265	37.71	2,232	40.06	2,122	86,919.44	40.96
Sociology, Economics	24.83	4,977	25.48	4,689	27.91	4,978	143,826.93	28.89
Sports, Recreation	10.07	618	19.27	525	21.36	571	12,430.82	21.77
Technology	34.16	1,629	35.77	1,507	38.60	1,630	65,004.19	39.88
Travel	18.36	248	18.92	207	22.07	216	5,127.40	23.74
TOTAL	$24.15	30,059	$24.66	28,913	$26.57	30,468	$827,244.76	$27.15

TABLE B

MASS MARKET PAPERBACKS AVERAGE PER-VOLUME PRICES

CATEGORY	1984 PRICES	1985 VOLS.	 PRICES	1986 FINAL VOLS.	 TOTAL	 PRICES
Agriculture	$2.85	7	$5.75	6	$ 36.25	$6.04
Art	8.28	3	9.80	3	29.40	9.80
Biography	4.45	79	4.81	76	391.55	5.15
Business	4.91	26	7.57	31	239.50	7.72
Education	5.15	12	6.07	20	145.55	7.27
Fiction	3.02	2,524	3.24	2,424	8,398.10	3.46
General Works	4.58	86	4.64	61	309.15	5.06
History	3.77	31	5.38	33	171.15	5.18
Home Economics	4.94	101	5.65	97	604.70	6.23
Juveniles	2.31	427	2.71	461	1,250.15	2.71
Language	5.55	14	4.28	17	89.80	5.28
Law	5.11	6	6.62	4	15.90	3.97
Literature	3.62	35	4.76	35	172.35	4.92
Medicine	5.01	36	6.65	43	308.80	7.18
Music	5.28	9	5.67	10	42.05	4.20
Philosophy, Psychology	4.38	112	4.22	82	416.05	5.07
Poetry, Drama	5.10	16	4.88	27	155.55	5.76
Religion	3.87	24	3.21	25	96.00	3.84
Science	3.55	15	4.83	14	82.70	5.90
Sociology, Economics	4.42	44	4.76	55	292.80	5.32
Sports, Recreation	4.06	149	3.80	160	654.95	4.09
Technology	8.61	42	12.29	36	435.05	12.08
Travel	5.86	9	4.93	10	50.15	5.01
TOTAL	$3.41	3,807	$3.63	3,730	$14,387.65	$3.99

TABLE C

TRADE PAPERBACKS AVERAGE PER-VOLUME PRICES

CATEGORY	1977 PRICES	1984 VOLS.	 PRICES	1985 VOLS.	 PRICES	1986 FINAL VOLS.	 TOTAL	 PRICES
Agriculture	$5.01	131	$27.05	198	$ 9.50	149	$ 1,969.14	$13.22
Art	6.27	671	13.13	593	14.04	641	9,908.85	15.46
Biography	4.91	560	15.09	536	10.78	591	6,688.24	11.32
Business	7.09	506	17.10	425	16.83	421	7,813.90	18.56
Education	5.72	433	12.84	440	12.98	412	5,770.87	14.01
Fiction	4.20	696	8.95	726	13.66	897	7,753.47	8.64
General Works	6.18	1,268	14.32	1,123	19.13	828	23,547.38	28.44
History	5.81	744	13.49	729	14.08	766	11,149.02	14.55
Home Economics	4.77	544	9.40	513	9.22	450	4,483.47	9.96
Juveniles	2.68	412	5.94	767	5.20	906	5,175.41	5.71
Language	7.79	219	11.60	252	13.25	287	4,106.65	14.31
Law	10.66	371	17.61	339	18.46	364	6,354.82	17.46
Literature	5.18	652	11.70	694	14.04	712	9,392.03	13.19
Medicine	7.63	651	15.78	698	16.01	692	13,380.92	19.34
Music	6.36	136	12.53	113	12.20	117	1,599.20	18.67
Philosophy, Psychology	5.57	540	13.64	523	13.25	564	7,535.05	13.36
Poetry, Drama	4.71	511	8.88	550	8.86	596	5,974.65	10.02
Religion	3.68	1,314	9.32	1,373	9.30	1,525	14,114.75	9.26
Science	8.81	589	16.22	677	19.78	707	16,453.94	23.27
Sociology, Economics	6.03	2,481	17.72	2,402	16.30	2,597	43,528.45	16.76
Sports, Recreation	4.87	467	11.40	447	10.66	430	4,939.52	11.49
Technology	7.97	692	21.11	722	21.08	682	17,422.38	25.55
Travel	5.21	274	9.88	235	10.48	299	3,262.30	10.91
TOTAL	$5.93	14,880	$13.86	15,075	$13.98	15,633	$232,324.41	$14.86

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The Moscow Book Fair: A Celebration of 'Glasnost'
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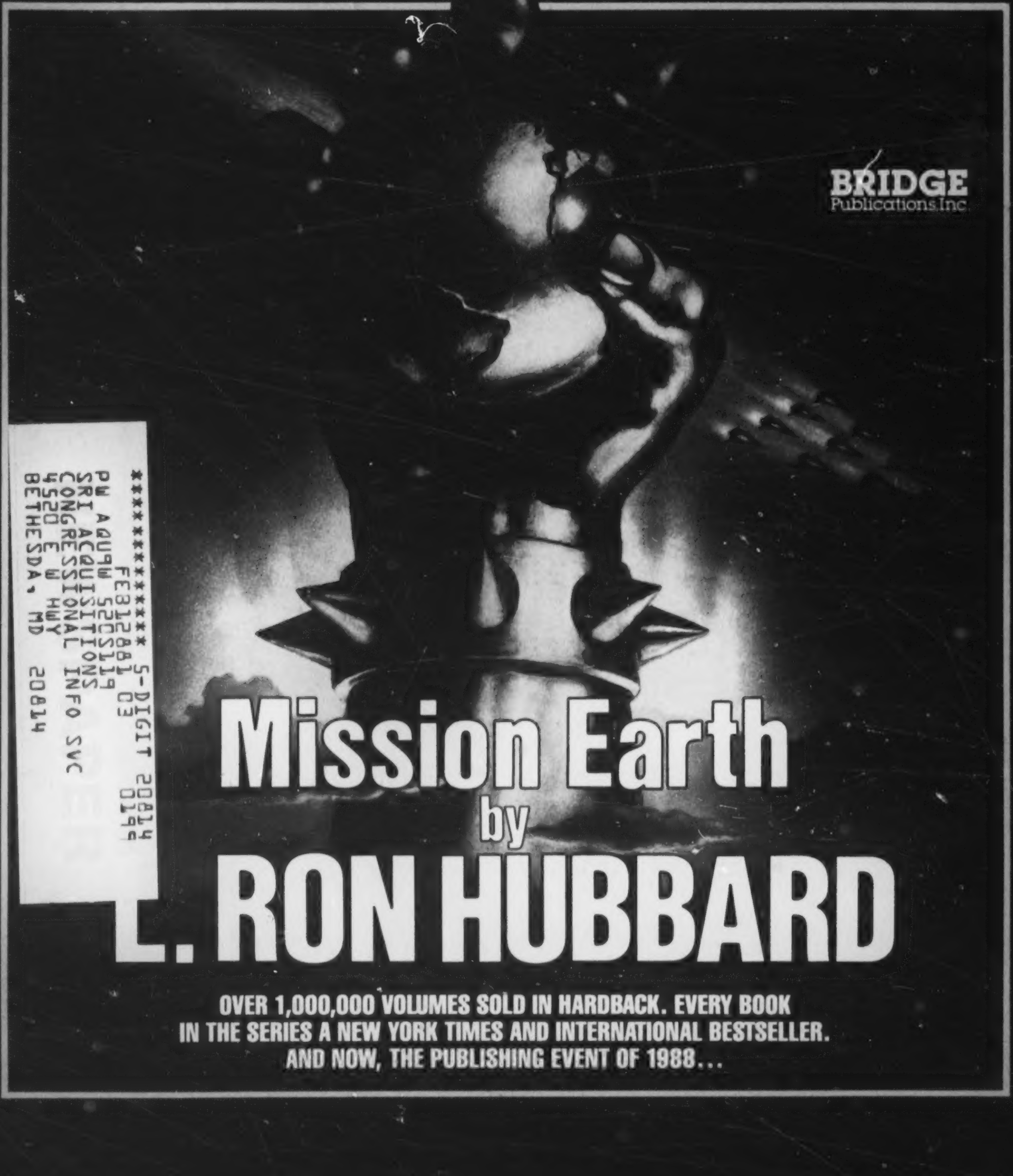
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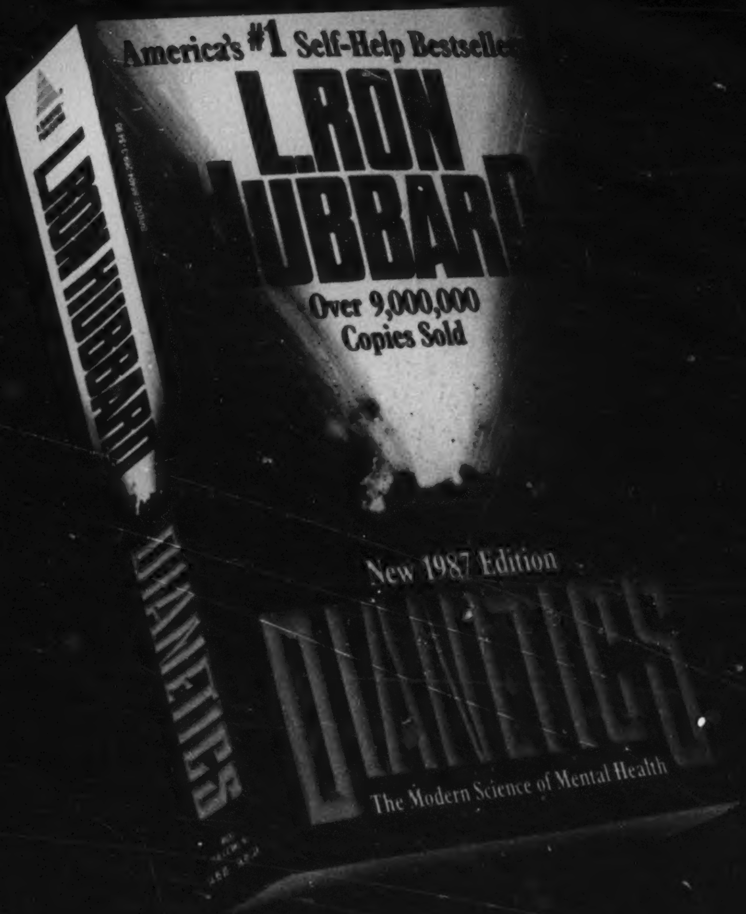
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THE DESSAUER REPORT

BY JOHN P. DESSAUER

SECOND QUARTER SALES: SOLID

Although dollar-sales increases during the second quarter did not measure up to those of the first, unit gains were better. A major factor was the dramatically improved performance of mass market paperbacks, which posted impressive dollar and unit increases. Juvenile hardbounds and paperbounds continued at a healthy pace, as did adult paperbounds. Book club growth slowed somewhat, and mail order publications experienced only minimal dollar improvement along with unit declines. Elhi textbooks showed modest dollar growth but insignificant unit gains. College texts and professional books declined.

Retailers posted the best performance among the market sectors, showing solid dollar and unit gains for both the quarter and year to date. If the industry were to maintain the cumulative pace of the first two quarters during the second two, this could turn out to be the most rewarding year for books since 1983.

ESTIMATED PUBLISHERS' NET BOOK SALES—SECOND QUARTER 1987

(Millions of Dollars and Units)

	Apr.–Jun. 1987		Apr.–Jun. 1986		Percent Change		Jan.–Jun. 1987		Jan.–Jun. 1986		Percent Change	
	Dollars	Units	Dollars	Units	Dollars	Units	Dollars	Units	Dollars	Units	Dollars	Units
Trade	711.6	149.93	625.7	139.64	13.7	7.4	1,406.5	300.70	1,216.2	279.98	15.6	7.4
Adult Hardbound	389.9	58.59	364.0	58.69	7.1	(0.2)	753.0	114.50	675.9	110.32	11.4	3.8
Adult Paperbound	176.8	40.14	147.3	36.30	20.0	10.6	381.6	89.17	319.8	81.34	19.3	9.6
Juvenile Hardbound	100.0	26.73	81.4	23.61	22.9	13.2	190.2	50.95	155.8	45.32	22.1	12.4
Juvenile Paperbound	44.8	24.48	32.9	21.04	36.0	16.3	81.8	46.08	64.7	43.00	26.4	7.2
Religious	165.0	30.11	158.7	31.64	4.0	(4.8)	332.9	62.23	316.0	64.54	5.3	(3.6)
Hardbound	117.4	13.03	112.0	13.65	4.8	(4.6)	236.5	26.94	223.1	27.98	6.0	(3.7)
Paperbound	47.6	17.09	46.7	17.99	1.9	(5.0)	96.4	35.29	93.0	36.55	3.7	(3.5)
Professional	539.8	37.09	547.4	38.36	(1.4)	(3.3)	1,206.4	84.00	1,107.4	77.94	8.9	7.8
Hardbound	356.6	12.18	363.9	13.13	(2.0)	(7.2)	789.8	27.24	736.1	26.81	7.3	1.6
Paperbound	183.2	24.92	183.5	25.23	(0.2)	(1.3)	416.6	56.76	371.3	51.13	12.2	11.0
Book Club	160.0	26.89	146.0	26.74	9.5	0.6	314.3	53.30	281.3	52.13	11.7	2.2
Hardbound	134.0	10.82	121.4	10.65	10.4	1.6	263.5	21.55	233.8	20.79	12.7	3.6
Paperbound	26.0	16.07	24.7	16.09	5.4	(0.1)	50.9	31.75	47.5	31.34	7.0	1.3
Mail Order Publications	150.1	26.49	147.0	27.98	2.1	(5.3)	315.5	55.54	305.4	57.98	3.3	(4.2)
Mass Market Paperbacks	247.3	149.89	206.9	127.72	19.5	17.4	477.2	297.24	442.7	271.47	7.8	9.5
University Presses	27.9	2.16	25.0	1.99	11.4	8.4	54.3	4.60	50.4	4.43	7.8	3.8
Hardbound	22.7	1.15	21.0	1.14	8.3	0.4	42.2	2.17	40.1	2.23	5.2	(2.7)
Paperbound	5.2	1.01	4.1	0.85	27.1	19.2	12.1	2.43	10.3	2.20	18.1	10.4
Elhi Text	448.4	66.22	418.9	65.68	7.0	0.8	580.4	86.72	542.3	86.07	7.0	0.8
Hardbound	258.1	23.51	240.1	23.36	7.5	0.7	333.5	30.62	310.2	30.45	7.5	0.6
Paperbound	190.3	42.71	178.8	42.32	6.4	0.9	246.9	56.09	232.1	55.62	6.4	0.9
College Text	142.4	11.79	149.2	12.81	(4.5)	(8.0)	345.8	28.13	329.1	28.10	5.1	0.1
Hardbound	120.7	8.08	125.7	8.67	(3.9)	(6.8)	293.1	19.28	277.3	19.04	5.7	1.3
Paperbound	21.7	3.71	23.5	4.14	(7.6)	(10.4)	52.7	8.85	51.8	9.07	1.8	(2.4)
Subscription Ref.	48.7	0.12	49.0	0.13	(0.6)	(6.1)	96.7	0.25	97.6	0.26	(0.9)	(6.4)
Total	**2,641.2**	**500.71**	**2,473.6**	**472.69**	**6.6**	**5.9**	**5,130.0**	**972.71**	**4,688.3**	**922.91**	**9.4**	**5.4**

ESTIMATED DOMESTIC CONSUMER EXPENDITURES ON BOOKS—SECOND QUARTER 1987

(Millions of Dollars and Units)

	Apr.–Jun. 1987		Apr.–Jun. 1986		Percent Change		Jan.–Jun. 1987		Jan.–Jun. 1986		Percent Change	
	Dollars	Units	Dollars	Units	Dollars	Units	Dollars	Units	Dollars	Units	Dollars	Units
General Retailers	1,477.5	241.82	1,326.1	221.39	11.4	9.2	2,886.8	463.24	2,539.00	428.19	13.7	8.2
College Stores	256.9	24 26	274.6	26.97	(6.4)	(10.1)	1,286.6	119.51	1,221.8	121.98	5.3	(2.0)
Libraries & Institutions	401.7	28.92	373.1	27.95	7.7	3.5	747.5	53.41	685.1	51.78	9.1	3.1
Schools	478.0	73.99	440.7	72.01	8.5	2.7	733.5	114.07	676.6	110.10	8.4	2.7
Direct to Consumer	445.0	57.06	435.2	58.34	2.3	(2.2)	967.3	124.75	907.4	122.36	6.6	1.9
Other	95.3	40.36	88.4	40.02	7.7	0.9	196.7	83.34	176.9	80.96	11.2	2.9
Total	**3,154.4**	**466.41**	**2,938.2**	**446.68**	**7.4**	**4.4**	**6,818.3**	**958.31**	**6,206.9**	**916.38**	**9.9**	**4.6**

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Frankfurt '87: Riding the Merger Wave

Children's Book Scene: SF for Teenagers • How the FBI Watched Writers

10th Birthday for New England Booksellers • 'Public Publishing' at UC Press

Publishers Weekly

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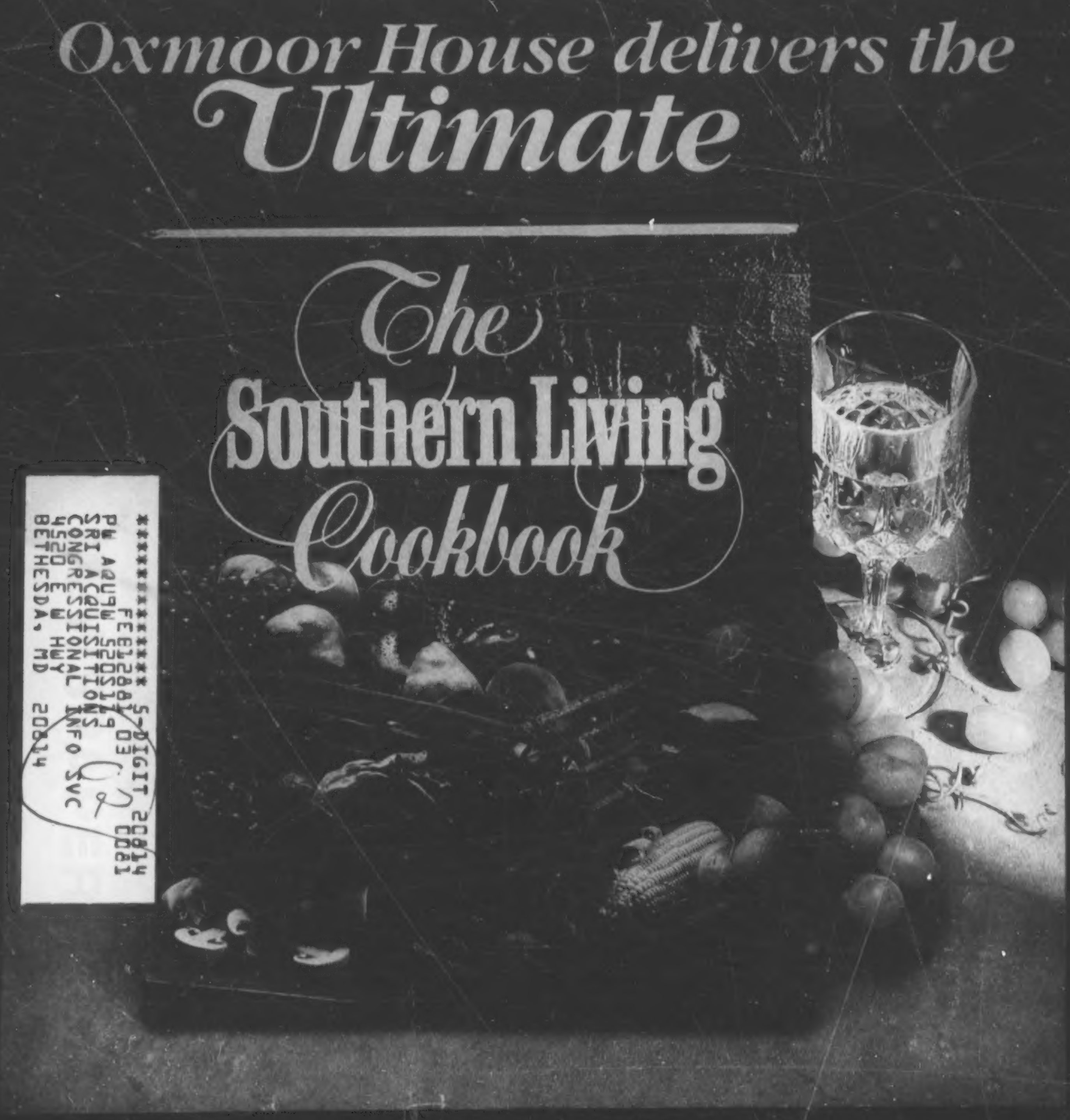
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8½" x 11". 384 pages. November.
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NEWS OF THE WEEK

EDITED BY MADALYNNE REUTER

Judge Limits Trade Books In Marin College Stores

Two Northern California booksellers have won their legal fight to keep a community college district bookstore managed by Barnes & Noble from selling a wide variety of trade books. After more than a year of litigation, a superior court judge has granted the booksellers a permanent injunction against the Marin Community College Bookstore. The precedent-setting ruling could invite similar litigation in the state's 106 community colleges, officials said.

"We're the only district in the state operating like this," said Myrna Miller, president of the college, adding that an appeal is likely. "It's very unfortunate that any local bookstore can keep a college from selling books. The booksellers saw this as a nose under the tent. They didn't want Barnes & Noble in Northern California."

On October 2, Marin Superior Court Judge Richard H. Breiner granted a motion for summary judgment from booksellers Mary Jane Dunstan and Woody Leary of Artist's Proof Bookstore and First Street Books, respectively, against the college.

Citing the state's education Code 81676, which restricts the sale of certain books in community college stores, Judge Breiner ruled in a six-page decision that a permanent injunction should be granted that would prevent the college from "selling or allowing to be sold" at either of its two college bookstores "any books, except textbooks, supplementary textbooks, and trade books required or recommended for college credit courses and community education classes and reference books."

Trade books comprise less than 10% of the campus bookstores' operations, said Miller. The judge's interpretation of the state statute will keep the college bookstore from having a simple process of ordering books and keeping them in stock, she said, adding, "It's going to be a lot of paperwork."

The booksellers had sued after the college's board of trustees entered into an agreement with Barnes & Noble to manage the two stores in August 1986. A preliminary injunction against the college was issued in September 1986. In December Barnes & Noble appealed, but the state court of appeal sent the case back to the trial court. According to Miller, when the suit was initiated the agreements with Barnes & Noble called for the college to pay the chain a minimum annual commission of $85,000 plus 7% of gross sales in excess of $1.5 million. In addition, Barnes & Noble agreed to remodel bookstore facilities spending no less than $40,000 and no more than $95,000.

Miller said that the college sought outside management for the bookstores to provide better service and a greater cost efficiency. "We knew that we had an unfair pricing problem in the bookstore in the spring of 1986, and Barnes & Noble was my response to changing that," she said.

According to plaintiff Dunstan, a former faculty member whose bookstore is two miles from one of the campuses, the agreement with Barnes & Noble to sell *New York Times* bestsellers and remainders at discount prices was "unfair." Dunstan and coplaintiff Leary said they were "delighted" with the ruling. "It will make booksellers in areas where there are community colleges alert to chains' taking over community college bookstores and turning them into full-service operations," said Dunstan.

Allowing the agreement as it stood between the college and the chain would have "just destroyed the neighborhood and independent booksellers," said Leary, whose bookstore is directly across from one of the campuses. "There weren't any disputed facts in the case. It's a permanent injunction against the district; even if Barnes & Noble leaves, this means Crown can't come in and do the same thing."

"Breiner concluded that, unlike parks and street corners, college bookstores were not intended as forums for the public," said Bob Owens, attorney for the college.

Counsel for Barnes & Noble was unavailable at press time. —MOLLY COLIN

AAP Sales Report for August

Category	% change, August	% change, YTD
Adult hardcover	20.8	11.2
Adult paperback	10.0	15.4
Juvenile hardcover	22.5	24.7
Juvenile paperback	9.1	24.6
Univ. Pr. hardcover	10.7	5.7
Univ. Pr. paperback	11.6	13.3
Bibles, etc.	1.1	7.8
Mass market paperback	-6.9	3.6
Book club	5.0	11.4
Mail order	-4.4	2.4
Sci-tech	7.2	14.3
College texts	22.1	2.0
School texts	3.0	5.8

Sen. Dodd Joins Battle Against Korean Piracy

Publishers concerned about an apparent breach of a Korean copyright agreement got some strong help from a U.S. senator for the complaint regarding the sale of two million pirated copies of U.S.-published textbooks.

Sen. Christopher Dodd (D., Conn.), a member of the Senate Foreign Relations Committee, wrote to the Korean ambassador to the United States saying, "This unfortunate situation . . . must be rectified as quickly as possible."

The Association of American Publishers, which represents most of the U.S. publishers whose books are involved, has hired its own attorney in Seoul to represent them in the matter.

At issue is the decision by the Korean government to allow the sale of two million books that were pirated before the Korean government adopted a new copyright law which went into effect July 1 and which bars piracy.

The AAP accused a U.S. agent for the Korean Foreign Book Publishing Council of misleading the Korean public and government about discussions that had been held with the AAP. Apparently it was suggested the AAP had said it was all right to sell the pirated books, and they were put on the market just before the start of fall college classes.

Dodd's letter to Ambassador Kyung-Won Kim noted that the United States and Korea had negotiated an agreement last year to halt the piracy and to work on a new copyright law that bans the practice.

He said the pirates not only were violating the agreement between the two countries, "they are also injuring the legitimate Korean book importing industry and causing substantial economic harm to American publishers and authors."

—HOWARD FIELDS